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ABSTRACT

This collection of papers presents the critical reflections on the management and planning of education of 18 senior officials working in 12 small island nations. The papers are a result of their participation in the Postgraduate Diploma in Educational Planning and Management in Small States program at the University of Malta. The book is divided into two sections. After an introductory essay and two papers on generic management and administration issues in small states, the papers in the first section deal with educational management, addressing the education process from its internal organizational or operational perspective. This section addresses such topics as resource allocation, Total Quality Management, staff recruitment, job satisfaction, and the role of principals. The second section of the book discusses educational planning, focusing on education as a tool for national development. This section discusses such topics as school-business linkages, the general role of educational planning, and specific developmental challenges facing primary, secondary, vocational, and adult education in small countries. Each chapter begins with a brief summary of the key arguments of the paper and ends with a discussion point based on the contents. (Contains a subject and author index.) (WFA)

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ED 480 944

Educational Planning and Management in Small States: Concepts and Experiences

Edited by Godfrey Baldacchino and Charles J. Farrugia

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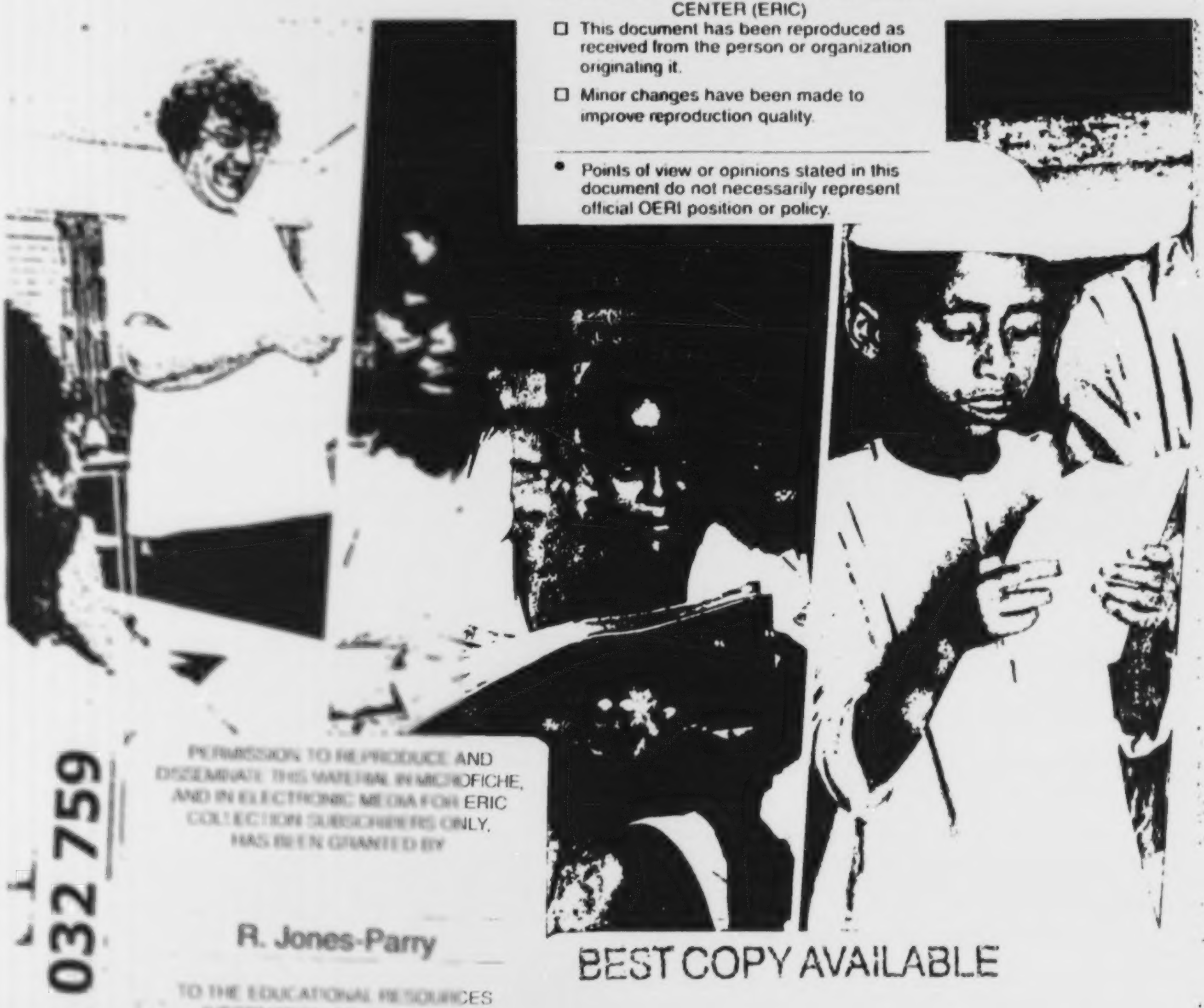

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Educational Planning and Management in Small States

Concepts and Experiences

edited by

Godfrey Baldacchino
and Charles J. Farrugia

COMMONWEALTH SECRETARIAT

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About this book

This text presents the critical reflections of 18 senior officials working in 12 small states on the management and planning of education. Their comments are driven by the insights they gained as adult participants in a unique post-graduate programme at the University of Malta devised by, and for, the distinct small-scale imagination.

The editors of this text are both academic members of staff at the University of Malta. Godfrey Baldacchino (Associate Professor) is a social scientist and an island and small state specialist; Charles J. Farrugia (Professor) is Pro-Rector, former Dean of the Faculty of Education and co-ordinator of the post-graduate Diploma in Educational Planning and Management in Small States.

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The Challenge of Scale: Educational Development in the Small States of the Commonwealth, Kazim Bacchus and Colin Brock (eds.), 1987.
The Multi-Functional Administrator, Charles J. Farrugia and Paul A. Attard, 1989.
Making Small Practical: The Organisation and Management of Ministries of Education in Small States, Mark Bray with Hubert Charles, Charles J. Farrugia, Steve Packer and Jakes Swartland, 1991.
Ministries of Education in Small States, Mark Bray (ed.), 1991.
Lifelines for the Isolated, John Weeks, 1991.

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Foreword

It gives me tremendous pleasure to write this foreword to *Educational Planning and Management in Small States,* edited by Professors Godfrey Baldacchino and Charles J. Farrugia. The peculiar challenges of small states, which comprise 32 of the 54 members of the Commonwealth, have long been a focus and concern of the work of the Commonwealth Secretariat. This is well reflected in the activities of the Secretariat's Economic Affairs Division which has a unit devoted to small states issues. It is further reinforced in the newly established division for which I am responsible – the Social Transformation Programmes Division – a merger of our health, gender and education programmes, in which an entire staff portfolio is devoted to education and human resource development in small states.

The editors, Godfrey Baldacchino and Charles J. Farrugia, have expertly assembled the dissertations and studies of participants in the highly successful post-graduate Diploma in Education Planning and Management in Small States which was co-ordinated by the University of Malta between 1994–98 with the support of the Commonwealth Secretariat.

It is exciting to note that most, if not all, of the participants were already on career paths in educational management and planning, so that their studies bring to us a rich sense of context and an appreciation of the realities of day-to-day work in the education sector of our small states. Whether it is the challenges of 'intimacy and *takitaki*' in Tonga, as discussed by Austin, applying Total Quality Management in St. Lucia's primary schools, addressed by Joseph, or transforming 'life-long education' in Cyprus, explored by Parperis, to mention only a few of the contributions, we have revealed to us that unique and complex tapestry that comprises the life of the education professional in the small state.

This book will not only inform and instruct students of education and management, but hopefully will provide leaders and policy- and decision-makers across the Commonwealth and beyond with a feast of knowledge and information about the remarkable yet challenging reality of management in small states.

Nancy Spence
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Director, Social Transformation Programmes Division
Commonwealth Secretariat
August 2002

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Introducing this Book

Godfrey Baldacchino

A slice of daily life?

The following characters are fictitious. The setting, however, could well be real:

> *... The phone rang again. The Principal Education Officer looked at Maria and pointed to the phone. 'Hello, Mr Dricken's office', Maria said. Peter Dricken [just back from an overseas trip] began leafing through a substantial collection of well-stapled A4 pages while Maria listened at the telephone, nodding. 'Yes, I'll tell him. Just a minute.' Still holding the telephone, Maria turned to Peter Dricken: 'The Minister wants to see you in his office at 2.30 this afternoon to discuss that World Education Finance report. The one you're looking at right now. His secretary says that he'll want you to provide some sort of abstract of the report so that he can convince the Cabinet on Wednesday that the five new secondary schools will be possible. Is that all right?'*
>
> *'Yes, of course, it's all right. It'll have to be all right, won't it?' He snatched the telephone from Maria. 'Ms Selima? Oh, Peter Dricken here. Yes, of course. I'll be at the Minister's office at half-past-two. But will it be just a meeting with the Minister or will there be anyone else there? Do you know? ... Mmm! I see – the Director General, the Director of Planning and Development and someone from the Treasury*

> *... Oh, and another World Bank Education Finance representative who's arriving today? Pity! Never mind. I'll be there this afternoon. Thanks.' He replaced the receiver slowly and remembered Maria.*
>
> *He looked at his watch. Three and a half hours to come to terms with this report and cook up a convincing argument for the five proposed new secondary schools, no matter what the aid agency said. 'Maria, take all this mail away, please, and deal with it as I asked you to. And some time in the next hour, try and find Jo Phloggs and send him to me. Oh, and try to keep all interruptions at bay!'*
>
> *Maria looked and sounded suitably sympathetic. 'I'll try, Mr Dicken, but I do have other people's work to look after and so many of the typists are new that they need constant watching too.' She moved away. 'Oh, I've just remembered. Patricia Amity is coming to see you at twelve. She made an appointment while you were away. She said it was urgent. ...'*

Peter Dicken, Maria, Joe Phloggs and Patricia Amity may sound like English names; but replace them by the appropriate Caribbean, Polynesian, Seychellois or Cypriot appellatives, upgrade the now defunct typists with computer operators, and what do we end up with? A typical slice of life in the office of a senior official in a Ministry/Department of Education in a small state.

You can certainly feel the tension, the exasperation, the 'management by crisis' in the air. The more you read, the more you realise the impossible situation that poor Mr Dricken is in. You can offer him your sympathy, but that will not solve his problems. ... Fortunately, it's not true. The extract is only a deliberate exercise in fiction. The scene is part of a made-up case study developed by John and Pam Weeks for the Commonwealth Council for Educational Administration (CCEA) and used with good effect as a discussion aid at a Pan-Commonwealth Meeting organised by the Commonwealth Secretariat at the University of Malta in February 1989 (Weeks and Weeks, 1989).

But is it really and simply a case of 'make believe' role play? The life of a senior education official in a small state is bound to appear quite daunting to the casual, external observer. There appear to be regular and intense demands on precious time from anxious subordinates, disgruntled teachers, concerned parents and scheming politicians. Effective time management is well nigh an impossible task. The whole panoply of services of a Ministry/ Department of Education must still be performed, and performed well, but by a much smaller cadre of employees. Foreign aid representatives are somehow always part of the equation, and their blithe offerings are to be met with something between benign neglect and bubbly enthusiasm. Inappropriate communications infrastructure and the constraints of an archipelagic jurisdiction increase the effort necessary simply to keep in touch with, let alone abreast of, what is going on. One develops the enviable skill of reading thick policy documents in a few minutes. Key decisions may be taken on the basic of 'expert advice' which is, in turn, based on a hurried and superficial scanning of select literature ...

Those of us who work in such an environment, or know about it from first-hand knowledge or experience, would probably beg to differ. We may smile curtly while admitting that the above is indeed the image which readily presents itself; but then be quick to correct this by asserting that life is not usually that bad and that incumbents very soon learn to 'manage' their working environment, achieving a better *modus operandi*. There is such a thing as planning and management in the Ministries and Departments of Education in small states.

This is not to say that there is nothing idiosyncratic in such planning and management. The Commonwealth Secretariat deserves full credit for asserting emphatically that small states have a specific 'ecology' of their own (Commonwealth Secretariat 1985, p. 6). In spite of their obvious historical, economic and historical differences, such small jurisdictions share an affinity in the challenges posed by small scale, often accompanied by isolation and insularity. They are still coming to terms with the realisation of this common denominator and the relevance of analysing organisational structures or processes in response to such challenges.

A long but steady development

The 'small state imagination' comes as a long but steady development. The need to broaden access to education and support improvements in education management and organisation amongst the 54 independent sovereign states comprising the British Commonwealth were the two main objectives of the first Commonwealth Education Conference held in Oxford in 1959. However, no less than 32 of these 54 members have a resident population of up to 1.5 million. Was a specific concern with the distinctive features of small states justified? The formal nod was given at a meeting of Commonwealth Ministers of Finance in Barbados in 1977.

Twenty-five years after that historic event, the Commonwealth Secretariat can boast of a track record of commitment to the acknowledgement of small scale as a pertinent category of analysis. A recent publication (Crossley and Holmes, 1999) bears witness to the richness, depth and scope of such a sustained concern, which has seen its major efforts focused on educational development in small states.

The Commonwealth Secretariat has been prominent, but not alone, in supporting path-breaking scholarship on educational planning and management in small states. Other notable contributions have been made by such institutions as UNESCO, through its International Institute for Educational Planning in France and its Regional Offices in Jamaica and Samoa (Bray, 1992; Lillis, 1993); some classic academic pieces, including grounded case studies published in a range of international journals (for example Atchoarena, 1991; Bennell and Oxenham, 1983; Bray and Fergus, 1986; Brock 1988; Brock and Smawfield, 1988); and a few books, edited papers or special issues of international journals (Throsby, 1987; Baldacchino and Bray, 2001).

The pioneering and ongoing efforts of the Commonwealth Secretariat in this area are readily acknowledged by the other contributors. This programme, which is very much work in progress, has been categorised by Crossley and Holmes (1999, pp. 20–38) in terms of a seven-point agenda:

1. The challenge of small scale and isolation in a post-colonial context (Bacchus and Brock, 1987; Bray and Packer, 1993);
2. Specific training policies and strategies for educators and educational administrators in small archipelagic states, where scale considerations

must be seen in the context of resource dispersal and physical scatter (Steward and Thomas, 1996; Weeks, 1989);

3. Professional collaboration and institutional development in post-secondary and tertiary education in small states, at national, regional and/or international levels (Bray, 1990; Crocombe and Crocombe, 1994; Louisy, 1993);
4. A comparative assessment of the organisation and management of Ministries of Education in small states (Farrugia and Attard, 1989; Bray *et al.*, 1991; Bray, 1991b);
5. The development of local and regional research, evaluation and consultancy capability in small states, which are often targeted beneficiaries of 'aid' (Lloyd and Packer, 1994; Crossley and Bennett, 1997, pp. 221–43);
6. The review of issues concerning examination systems in small states, inclusive of the tension between the local content and relevance of education and the international currency of qualifications (Commonwealth Secretariat, 1996; Bray and Steward, 1998);
7. The awareness and elimination of barriers to the adoption of information and communication technologies (ICTs) in small states, and a sensitivity to the threats that these developments may pose to indigenous knowledge (Commonwealth Secretariat, 1997a).

The postgraduate diploma at the University of Malta

Crossley and Holmes (1999) make two separate references to a Postgraduate Diploma in Educational Planning and Management in Small States run at, and by, the University of Malta. This diploma has been hailed as a vivid example of effective human resource development for, and by, educational specialists in small states. This accolade is also provided in another publication (Commonwealth Secretariat, 1997b, p. 137) where a key strategic linkage is established between effective policy-making and such critical learning and research as is sensitive to the 'signature' of the local small-scale environment, in both absolute and comparative terms. The curricula, lecturers and recommended readings of this programme have been carefully conceived or judiciously selected with one key objective in mind – to immerse participants into a stimulating learning environment where they are continually obliged to challenge the received wisdom of their prior formal learning and, instead, to consider scale as an intervening variable. This intellectual journey may be initially confusing; but is an ultimately liberating experience.

Such a post-grad diploma programme, which ran between 1994 and 1998, remains to date a unique example of successful 'bridge building' between different small states of the Commonwealth who have thus pooled their personnel to come together for an academic year in a host small country to learn from each others' experiences in the planning and management of small scale educational systems. Its general outline, aims and structure were conceived by the co-editor of this volume, Charles J. Farrugia, and fleshed out after Dr Mohan Kaul, then Director of the Management and Training Services Division of the Commonwealth Secretariat, visited the University of Malta in March 1994 in order to discuss practical areas of collaboration. Over a 5-year span, 34 senior education officials from 17 small states in West and Southern Africa, the Mediterranean and Caribbean areas, and the Indian and Pacific Ocean states went through a 30-week residential course leading to the award of a diploma by the University of Malta, the oldest University in the British Commonwealth outside Britain (see Table 1.1). These officials benefited from a specific Commonwealth Secretariat scholarship to travel and spend many months uninterruptedly in the small island state of Malta. Many of them had already occupied fairly senior positions in their respective education departments or ministries. Following the diploma programme, most have reported further occupational advancement.

The post-graduate diploma in educational planning and management in small states was set up with the key objective of enabling its adult participants to:

- acquire an understanding of a theoretical framework and develop concepts which enabled them to appraise and tackle development issues pertaining to educational systems in small states;

- understand the special characteristics of small states and the features that influence the development of their educational systems;
- develop further the capacity to operate within the educational, social, economic and human resource milieu of their specific country;
- refine their ability to analyse situations and formulate effective strategies that are most suitable to the educational needs and challenges of their country, within the framework of current developments in educational theory and practice.

Educational planning and management issues in small states may appear similar to those in large states, but the scale factor – usually complemented by insularity – renders their subject matter quite distinct. It is true that small states, like bigger ones, have to grapple with the provision of universal primary and secondary schooling, the ever-expanding demands for post-secondary and tertiary education and the requirements of their many ancillary support services. Senior personnel in Ministries, Divisions or Departments of Education in small states, like their colleagues in larger countries, have to plan, discuss and decide issues relating to curriculum development, the running of national examinations, the distribution of educational materials, the selection and training of staff, and the many other facets of a national educational system. However, the smallness of scale as well as often limited and overstretched material and human resources, introduce educational planning and management dimensions that place small educational systems in a league of their own. Furthermore, smallness in size and population often lead to the formation of a particular social ecology composed of closely knit, integrated and, at the same time, open communities with highly personalised relationships. These factors also create their own specific educational planning and management considerations; these, in turn, call for specialist study and treatment. The post-graduate diploma in educational planning and management in small states provided the senior education officials who were its students with the theoretical, conceptual, methodological and practical foundations for work in this area.

Course content

The first module of the course set the context for educational planning and management needs in small states. Through the presentation of country papers, course participants had the opportunity to explain the educational system of their own country and compare the main planning and management issues emerging from the scale factor. Country papers provided the background to the principles in the evaluation of the educational systems governed by the characteristics of small states within the parameters of current educational planning and management theories.

The second module dealt with human resources and their optimum utilisation, especially in countries where they are in short supply. This module provided opportunities to investigate approaches which enhance the motivational qualities required by educational leaders, and to take steps to handle or reduce the level of stress that often results from multifunctional roles.

Dependency, vulnerability, decentralisation, economics and development issues in the context of education in small states were analysed in the third module. Discussions here revolved around the above themes, from the perspectives that emerge within the parameters of small public administration systems.

Module four provided the tools for efficient educational planning and management through statistics and research methods in education, effective time-management in multifunctional situations, as well as financial planning and management.

Further aspects of planning and management were reinforced in Module five. This covered quality assurance in education, together with the skills needed to manage behaviour and decision making in the educational context.

In addition, course participants selected a minimum of three optional, or elective, units from module six. These units included: distance learning, work processing and office computing; curriculum development; adult and non-formal education; and examination and evaluation systems in small states.

These six university campus-based modules were reinforced by two work placements of two weeks each. The first practice took place in a school setting, while the second provided practical experiences in a small state public service environment. During these practice placements, the senior officials could draw upon their own experiences and share them with colleagues engaged in similar educational and planning services.

Participants were also required to concentrate on a selected area of research, to which they devoted a 10,000-word dissertation, undertaken under expert supervision.

This book

This publication is based on a judicious selection of the research output of those senior education officials who spent time as students taking part in a unique, scale-sensitive programme. The actual selection of 20 papers has sought to do justice to the great diversity of small-state milieux experienced by the students, in application to specific challenges in the planning and/or management of education. Most of the arguments, examples and concepts presented in the essays that follow owe their origin to the dissertation that each student was expected to complete successfully as part fulfilment for the award of the postgraduate diploma.

This text seeks to fulfil the following five main objectives:

1. To provide educational policy-makers, students and practitioners in the small states of the Commonwealth with a manual of case studies in educational management and planning, adopting a conceptual approach sensitive to, and inspired by, the 'ecology' of small scale.

2. To add to the rich collection of publications by the Commonwealth Secretariat on this subject, and in particular to contribute to capacity building and institution strengthening in its specific field. 'Steady as she goes' then, this time alongside a new major series of publications on *Education in the Commonwealth*.

3. To pay tribute to the active involvement of small island nationals in diagnosing their own educational challenges, thus strengthening the relevance of the issues and the transfer potential of any lessons learnt.

4. To further enhance the visibility of case study material from small states which, because of the market limitations of its provenance, often does not make it to print, irrespective of its quality, appeal and transferability.

5. To share and disseminate such experiences and their analysis to wider audiences which may benefit from the similarity of the case being addressed to the particular educational challenges of their country or region, especially in micro-contexts – such as islands, remote villages or ethnic enclaves – where circumstances similar to the small-state milieu may be in place.

Structure of this book

This book is divided into two main sections. After this introductory essay and two papers on generic management and administration issues in small states, a selection of papers deals with issues in **educational management**. The papers basically address the education process from its internal organisational or operational perspectives. They look at ministries, departments and schools as organisations; their management implies the effective and efficient use of human and material resources deployed in the execution of desirable goals. Total Quality Management (TQM), staff recruitment and appraisal, job satisfaction, stress management and the multifunctionality of incumbents are key considerations.

The second section deals with issues in **educational planning**. It considers education as a tool for national development and looks at the rapport of the educational system with the external world and its various stakeholder interests. It considers the influence and role of educational planning generally, and then looks specifically at different developmental challenges: those facing the teaching staff themselves, those involved in school-business linkages and those presented by primary, secondary, vocational and adult education.

At the start of each chapter, there is a brief summary of the key arguments of the contribution and of the main small-state considerations it considers; a discussion point based on the content of the paper is presented at the end of each chapter. These devices facilitate the use of the book both as a reference manual and a user-friendly learning tool.

Being critical

Finally, there is one particular novelty in going through a manual which is written by senior education officials, not in their official capacity as bureaucrats or public servants, but as students in a foreign country. The physical separation from home, the academic obligation to avoid dogmatism, the long and deep contact with expatriates operating in similar contexts but with different responses to similar working challenges – all these factors present us with a valuable, non-apologetic piece of work. Here we find the reflections of critical thinkers – practitioners who readily question structures, expose weaknesses and creatively conceive of avenues for cultural or institutional change. These are important components of the conceptual baggage and professional commitment necessary for the plausible pursuit of a new, alternative paradigm of how education-linked organisations should, and can, be run. Of course, all the comments are personal, written by people undergoing an academic programme, and certainly must not be interpreted as necessarily official positions. But the insights are revealing in the frankness and disposition of their authors not to mince words.

'Peter Dricken' may be a stereotype; but so tend to be various self-congratulatory and 'politically correct' documents illustrating what are assumed to be universal standards and norms of operation of bureaucratic organisations the world over. What makes this text unique is its avowedly critical nature. This manual seeks to provide an intellectually challenging contribution to small state scholarship and capacity building, through the eyes of the actors themselves.

Table 1.1. Post-Graduate Diploma in Educational Planning and Management in Small Island States

Name of Participant	Country of Origin	Year
Abdulla ISMAIL	MALDIVES	1997/8
Ahmed Ali DIDI	MALDIVES	1996/7
Andreas KIRLAPPOS	CYPRUS	1996/7
Anthony DE GIOVANNI	MALTA	1995/6
Antonis MOUSOUZOS	CYPRUS	1996/7
Bouy BABOUCHARR	GAMBIA	1995/6
Christian CAFRINE	SEYCHELLES	1995/6
Demetrios ENGLEZAKIS	CYPRUS	1994/5
Epenesa Lafi ESERA	SAMOA	1994/5
George P. SAID	MALTA	1994/5
Iacovos PARPERIS	CYPRUS	1995/6
Jean Andre' ALCINDOR	SEYCHELLES	1996/7
Jeffrey LEGRENADE	SEYCHELLES	1995/6
Joe Jesse DICK	VANUATU	1994/5
John E. WHITE	ST KITTS-NEVIS	1995/6
Kenmore Addison ELLIS	ST VINCENT & the GRENADINES	1994/5
Klelia SOURMELI-SKOTINOU	CYPRUS	1994/5
Lesroy Alstyn MERCHANT	ANTIGUA & BARBUDA	1994/5
Loizos ANASTASSIADES	CYPRUS	1995/6
Malehlohondo LENGOSA	LESOTHO	1994/5
Marcus EDWARD	ST LUCIA	1997/8
Marie Claire HENRIETTE	SEYCHELLES	1996/7
Melton Basinah BANGALE	BOTSWANA	1994/5
Michael ECONOMIDES	CYPRUS	1997/8
Mohammed BUSHRY	MALDIVES	1994/5
Peter JOSEPH	ST LUCIA	1996/7
Ponepate TAUNISILA	TONGA	1997/8
Ramsey Peter SOSOLA	MALAWI	1997/8
Raymond CAMILLERI	MALTA	1994/5
Ronald BOWMAN	MALTA	1995/6
Salote PUNIANI	TONGA	1996/7
Selby DORA	SEYCHELLES	1994/5
Siaka S.A. CAMARA	GAMBIA	1997/8
William ZARINE	SEYCHELLES	1994/5

2

Rewards and Tribulations of Senior Education Managers in Small States[1]

Charles J. Farrugia

Introduction

Senior public officials in small states play a crucial role in the educational, economic, social and political development of their countries, and it is essential for those involved to understand the factors that condition the work of this small but highly influential group. It is important for senior officials in small states and their political bosses to understand that they all work under conditions that are significantly different from those of their colleagues in larger states, even when official titles and job specifications are identical. Their work environment deserves customised understanding and demands special treatment.

In many respects, the distinction between small and large developing countries is difficult to establish. Most of both tend to have a colonial past, struggle with weak economies, contain limited human resources and aspire toward improved social goals. They refer and rely on the technical know-how, the finance, and sometimes the culture of rich developed countries, more so with the advent of globalisation. The characteristic that distinguishes small states as a specific category is precisely the scale factor, a factor that renders their work environment and social context distinct.

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[1] This paper is adapted and updated from one entitled 'The Special Working Environment of Senior Administrators in Small States', published in *World Development*, Vol. 21, No.2, 1993, pp. 221–226, © 1993, with permission from Elsevier Science.

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Small and different

The scale characteristic leads to the formulation of a particular social ecology composed of closely knit, integrated, but open, communities with highly personalised relationships. These special features render the social milieu of small states very different from that of larger, developing countries, and the work of their senior officials becomes more diffused, yet more interrelated and complex.

Take education as an example. Regardless of size, national educational systems require a basic administrative and managerial organisation to provide efficient services. A state of 300,000 inhabitants, just like a country of several millions, needs a Ministry of Education to handle the same range of services offered in larger countries. Ministries in small states require departments to deal with personnel management, administration, human resource development, overseas linkages, buildings, maintenance and so on. The actual number of people working in each branch, section or unit will be fewer, sometimes far fewer, that in larger states, but the difference is not proportional to the overall population. The pressures on personnel who are expected to fulfil a number of roles and responsibilities are proportionately much higher in smaller countries.

Multifunctional roles

Small states attempt, indeed they are compelled, to extend their resources and lower per capita costs by requiring senior officials to act in multifunctional roles, to the extent that one senior official becomes responsible for several sectors which in larger countries are catered for by separate units and different groups of officials. They do not enjoy the luxury of concentrating on one responsibility or a specific cluster of concerns. Educational officers in small states, for example, cover the pedagogical and curricular development of several subjects taught in all the sectors of the educational system. They take responsibility for all the languages taught in primary, secondary and technical schools, or supervise all the history, geography or social studies taught in the system. In addition, they are called upon to monitor teachers' work in schools, run in-service courses, lecture in teacher education institutions, prepare budgets, sit on purchasing committees, chair selection and promotion panels, attend policy meetings, meet parents and teach their subject specialisation in one or more secondary schools. In addition, senior education officers are constantly in demand to deal with the minor and not so minor crises that originate in schools.

Multifunctional, senior officials in small states act at one and the same time as top executives as well as leading professionals in their particular fields. As top administrators, they manage their office, issue directives, follow instructions from the Ministry, keep correspondence with agencies and colleagues abroad, compile data, prepare capital and recurrent budgets, keep tabs on staff and control stock – all this as well as a plethora of other mundane duties.

As leading and practising education professionals, they are expected to keep up-to-date with and introduce innovations, follow up projects, advise politicians on policy matters, monitor the progress of subordinates, and provide moral and political support to those at Head Office as well as to those in the field. In contrast, larger systems can afford to separate managerial from professional roles since the various duties within each role can be distributed among different officials. Small states lack the personnel or the finances to allow such parcelling off of duties.

Without any doubt, the closely integrated roles in small states have some positive advantages. The varying tasks handled by the same individuals broaden their experience and widen their insights into the many facets of the national system. On the other hand, the necessity of sharing time and attention, as well as the need of developing adequate levels of knowledge and skills in various areas, weaken the area of expertise of the multifunctional official.

Furthermore, the multiplicity of roles drains the mental and physical well being of senior officials in small states. It is extremely demanding to shift rapidly from one task to the next, or to change from one decision-making process to another, or to deal with varying groups of people in assignments that are totally unrelated. These dimensions are strongest in communities where relationships are close and transparent.

High degree of interpersonal relations

The high degree of interpersonal communications and the transparency in small states are other factors which influence greatly the work of senior educational managers. Small states with a small number of inhabitants develop closely integrated societies containing an intricate network of personal relationships. These factors facilitate and hasten communication processes, but also obstruct and complicate them. People know each other (or know someone who knows someone whose services they need) so that cabinet ministers, parliamentarians, high government officials, influential business persons and their functionaries are well known and reachable. It is not unusual in these circumstances for people who cannot obtain formal appointments to get invited to social functions or family reunions where they can 'casually' meet the minister or official concerned. In extreme cases, the supplicant would call at the minister's or the official's home, which is easily identifiable. Senior officials in small states form part of this social communication network and consequently can be 'met' or accosted through official or unofficial channels. At the same time, they themselves use established or unorthodox approaches with those they want to meet.

This type of communication network has its advantages and disadvantages.

Ideas, views, requests, complaints and proposals are communicated easily and quickly, and often personally, to the official concerned. People know the abilities, needs and idiosyncrasies of each other and act or react accordingly. Through close personal contact, people's reactions and feedback to political and administrative decisions are gauged accurately so that political and administrative decisions are taken and implemented without long delays. Furthermore, because the feedback mechanism if often quick and efficient, policies and decisions which misfire can be re-evaluated, revised, modified and, in extreme cases, completely reversed.

The highly personalised societies of small states, however, create problems when the policy-making and the decision-implementing process cannot remain anonymous. For example, it often happens that the seeker for a job is well known to the interviewer; the Chief Education Officer is also the president of the sports club and lives in the next village; the wife of the Director General of Education could be the chairperson of the playing fields association and can be met at the monthly meeting. Mr X and Ms Y may be 'accidentally' encountered every Friday evening at the local supermarket or at the social club. Such informal contacts can be abused. Many necessary decisions and actions can be modified, adjusted and sometimes totally neutralised by personal interventions and community pressures. In extreme cases, close personal and family connections lead to nepotism and corruption.

Senior education managers face the major challenge of deciding how they can capitalise on the advantages of these close personal contacts and relationships, and at the same time minimise the potential ills that the personalised style of management generates. Such challenges present themselves in the educational as well as other social fields.

Social cohesion and communal tension

Small communities develop strong social cohesion. Once the social unity is ruptured, however, the divisions that ensue run deep and take many years to heal. Minor issues, which are easily absorbed in larger states, assume national dimensions in small ones. Minor divisions in one group, which are allowed to spread eventually, pervade other sectors of the population. In communities where practically everyone knows everyone else, individuals' utterances and actions soon become public knowledge; once a position is taken, people find it difficult to retract. This is especially so in communities where the close personal interactions belie long-held suspicions and age-long feuds rage silently among groups or family clans. In such circumstances, once rival positions become public, it is extremely difficult to avoid the polarisation that ensues. Furthermore, disagreement on one issue then extends not only to related matters but also to totally unrelated issues. For example, a dispute about land ownership can lead to debates on individuals' genealogy and arguments about their respective families' contribution to the community's welfare. When this happens, friendships, family loyalty and community pressures can interfere with the decision and implementation process so that the integrity, competence and willpower of public figures, including senior government officials, are sorely tested.

In extreme cases, divisions in closely integrated societies lead to serious community rivalry or even civil strife. Fortunately, this extremity is rarely reached, but the effects on the social, economic and political strife of small states can still be far-reaching. For example, rivalry between sectors in small communities can lead to open or subtle boycotts by one group against a rival group's ideas or projects, regardless of how valid or useful they are. As a result, only a fraction of the available talent is utilised and only a section of the population benefits. Furthermore, rivalry leads to duplication of efforts and costs, and the wastage of the limited human and material resources available.

Perpetuating neocolonialism

A more pervasive outcome of this rivalry is the way it undermines local initiatives and makes the small community reliant on outsiders, thus perpetuating the dependence evident in the inhabitants' greater trust on ideas, products and projects that originate overseas. In the educational sphere, for example, rivalry between authors of school textbooks and the desire of the authorities not to take sides may lead to the adoption and purchase of foreign books. Here the culture of economic and intellectual dependence generated by their ex-colonial status comes into play. Inhabitants of small states often unwittingly undermine regional or local initiatives through the ex-colonial mentality that gives greater credence and value to activities and institutions of a foreign origin, even when local initiatives and projects produce better results. In recent years, the dual forces of the mass media and globalisation have gradually replaced pro-colonial sentiments. Small states tend to have a strong national and cultural identity; yet, because they feel small and vulnerable, they remain intellectually dependent on larger states. They see themselves as miniature models of larger nations and attempt to emulate them without realising that as small states they have an 'ecology' of their own. This tendency leads to the neglect of local initiatives and the disparagement of indigenous ventures in preference to imported transplants. In such circumstances, it becomes the special duty of senior education officials to liaise between rival cultural groups, including political rivals, to bridge the rifts. In their small country's interest, these officials have to ensure that human and material resources are not squandered through internal squabbles.

Limited human and material resources

Those who work in small states know that limited human and material resources are a constant source of worry and that the demands of equally deserving projects competing for restricted funds and personnel are perennial problems. Here, the entrepreneurial role of senior education officials becomes critical. They have to ensure that the section for which they are responsible in the organisation remains vibrant and dynamic. As the country's leading public managers, they have to originate ideas, encourage others to do likewise, and facilitate the implementation of innovations. In the role of leading entrepreneurs, senior officials have to craft and lead projects. They have to keep abreast of relevant developments in other countries in order to adapt them to local needs. Again, this function is extremely important in small states which do not possess the human and material resources to carry out from scratch extensive research and development projects specifically directed towards their own local requirements. For example, how many small countries, in spite of the technological revolution of desk-top publishing, can afford to print a small number of well-illustrated, own language, text books specifically written for their own context?

Small countries with volatile economies depend on restricted internal markets and the vagaries of multinational co-operation. They cannot support the elaborate and expensive administrative structures required by the demands of service systems that most states strive for. Senior education officials have to become experts at overcoming resource and financial limitations with a pioneering and entrepreneurial spirit.

Problems of scarce resources, however, are often compounded by personal pressures from politically powerful individuals and influential colleagues who carry weight in the small community and who very well know where to apply the pressure. The persistent ones can sorely test the fortitude and integrity of officials who have to distinguish the peripheral needs of the powerful and the clamorous from the more urgent requirements of the silent sufferers. Senior officials in small states can do without such stress and pressures, but where these exist they have to deal with them forcefully and honestly.

Personal pressures and demands

The complex interpersonal relations described earlier, the multiple roles of senior managers, together with often poor economic returns for demanding work, exert further pressures on the personal lives and professional development of these officials. They need to develop special administrative styles and managerial strategies to cope with them.

Senior education officials in small states frequently sacrifice personal expertise in order to deal with multifarious responsibilities; they also need to switch continuously from one assignment to a totally unrelated one. These demands lead to restricted or blunted personal and professional development, especially when they cannot find the time and mental energy to devote to complex education developmental projects. They are often forced to spend most of their time dealing with many mundane *ad hoc* chores that have to be resolved 'now' and postpone the more thought-provoking problems to 'quieter moments' which never seem to materialise. In the long run, unfortunately, these conditions are detrimental to the personal well-being of the individuals concerned and to the corporate growth of the system they serve. The situation becomes even more frustrating when so called foreign experts are called in to deal with problems, which the locals can solve if only they are provided with the time to do so.

International commitments

Another extremely demanding role specific to senior officials in small states emerges from their country's commitments as a member of the international community. In addition to their domestic duties, the few high officials available have to deal with their country's international obligations, a dual role that weighs heavily on a small country's limited human resources. At the same time, they cannot abandon or even neglect international contacts, since this would result in the loss of one of the small states' major assets, namely a say at international fora. It was precisely their participation and voting power in international organisations that brought small states and their special characteristics to the belated attention of the larger, more developed ones. Senior officials of small nations, therefore, have to attend international meetings not only to keep in touch and to make their contribution but, equally important, to state their case. Furthermore, many small states have to fulfil their commitments as members of regional and international organisations, even if these further strain their meagre human resources. Senior education officials have to maintain contact with their overseas counterparts so as to widen their professional and personal vistas, to keep in touch with developments in technologically more advanced countries, and to establish working relationships and friendships which they can draw upon when the need arises.

Ironically, however, interaction with foreign counterparts can become a major source of personal frustration. Senior officials from small states soon discover that their salaries, prospects for promotion, work loads, support staff, ancillary services and fringe benefits, compare poorly with their colleagues' from more prosperous countries. Here again, the poor economies of various small states come to the fore. Personnel in the state sector often constitute the largest single category of employees and even a small salary increase can cause a considerable dent in the national budget. Furthermore, salary increases for senior education officials would lead to similar claims by others, claims that weak economies cannot sustain. Consequently, even when the politicians and the inhabitants of these states recognise and wish to reward deserving education personnel for their valuable work, the economic state of small countries could dictate otherwise.

Transparent societies

In the special circumstances of small states, other socio-economic factors have to be considered, such as the question of salary relativity between grades in the public service and employees in the private sector. In transparent societies, salaries and one's placing on the salary scale extend beyond the question of income: they also reflect social status, official recognition and appreciation for one's work. People who have grown up and studied together, and who are familiar with each other's capabilities and limitations, inevitably compare their own placing in the social hierarchy with those of colleagues or rivals. Unfortunately, such comparisons are not always carried out without prejudice or envy. In a closely interrelated, particularistic culture, some officials subtly refuse to acknowledge the newly attained seniority of a former colleague whose promotion they consider unmerited. Social status does not feature so strongly in large states where personal relationships are diffused by sheer distance and anonymity. Similarly, the ill-effects of personal pique are minimised by the size and universalistic nature of the much larger public service. In small states, salary improvements and the related social statues have to be carefully evaluated for their socio-economic implications within an overall and finely balanced incomes and prices policy.

Officials who understand and appreciate the social and economic factors that control their work are more likely to accept and tolerate them. Such awareness mitigates the personal disappointments and professional frustrations of senior personnel when they compare their working conditions with those of colleagues from more prosperous nations.

The complex question of limited promotion opportunities is one such example. Size limitations of organisations in small states seriously restrict promotion opportunities so that many capable young men and women in the service feel that their ambitions for professional growth and personal economic improvement are seriously stunted. They are attracted by better opportunities in larger, more developed countries, which in turn leads to a brain drain and the loss of valuable scarce expertise.

Another phenomenon results from the fact that limited employment opportunities may encourage people in small states to seek work within the security of state employment rather than in the more scarce, but better paid and more volatile, jobs provided by private industry. Consequently, state or parastatal employment in small poor countries becomes inflated and leads to skewed organisational structures with large numbers of employees at the lower range of the salary scale, but tapering off sharply at the top end where salaries are higher. As a result, junior officials at the broader end of the pyramid have to compete vigorously for the few positions at the top. Keen competition for promotion causes friction among colleagues; impatience to move to the top leads to conflicts with superiors. Both conditions result in frustration and stress which become more intense in small communities than in larger impersonal bureaucracies.

In the educational sphere, the frustrations caused by professional limitations are strongest among officials who have been on scholarships abroad. They know that their former study institutions offer better opportunities for research and academic fulfilment with more promising career advancement and more attractive monetary rewards than are available in their own country. The frustrations are exacerbated when scholarship holders return to their previous posts only to find senior positions blocked by older and less qualified, if more experienced, officials. It is no wonder that many small states find it difficult to retain the services of younger, better qualified officials.

Small can be, but is not always, beautiful

One can argue that the problems identified above are not exclusive to small states. Many senior education officials in large states find themselves in similar situations that require careful handling. They too find it difficult to come up with wise managerial decisions that balance an individual's personal aspirations with national needs. In small states, however, the impact of policy decisions is more rapid, the social implications become more potent, and the per capita loss is much greater. As a result, the wastage of valued, sometimes unique, manpower and expertise causes more damage in small states than in big ones. Thus senior officials in small states have to strive harder to maintain a harmonious working relationship amidst social, economic and political forces which compete to unbalance it. They have to co-ordinate the workforce in such a manner that encourages initiative and hard work where the rewards are often more intrinsic rather than monetary. Such intrinsic rewards consist of a few words of encouragement and congratulations, opportunities to demonstrate one's creativity, the gratification of working in a dynamic team, the pleasure of personal professional achievement, the knowledge that one is contributing to the improvement of the country's education system, and the satisfaction of doing a good job. If this sounds too idealistic, in most cases it is also true.

The special characteristics of small states are conducive to positive orientations even when their limitations and handicaps are many. Indeed, their problems should be viewed in proportion to their size since a realistic evaluation of the variables involved will place the problems of small states in their real perspective. In this perspective, the solutions need not seem as prohibitive as they may appear initially. One only needs to remember that the number of people, the geographical dimensions and the finances involved are not so high as to present insurmountable difficulties. For example, the size and population of a small state are normally equal to those of small or medium-sized towns in larger countries, the entire education budget is often equivalent to the cost of purchasing a sophisticated aircraft an d all the personnel employed by one ministry may number less than the workers in a medium-sized factory in a large industrialised country.

A medium-sized grant from a donor country or an aid agency can solve problems which may require billions of dollars in much larger states. Yet, for many senior officials in small states, such arguments provide little consolation: to them their problems are real and sometimes overwhelming. They require special skills to meet their particular needs, as well as understanding and support from the national system they work for. They need to draw upon the experiences of their colleagues who have faced similar problems and found solutions to them. They would be pleasantly surprised and relieved to find out that their rewards and tribulations are shared by other officials, operating in different jurisdictions, which, however, share the environment of small scale.

3 Issues in Human Resource Management for Small States: A Tonga Perspective

Salote Puniani Austin

KEY ARGUMENTS

- A sound analysis of the workings of the Ministry of Education in a small state such as Tonga can be made through the conceptual compendium of monopoly (the tendency towards oneness), intimacy (excessive familiarity), totality (a small but complete world closed onto itself) and emigration (the extra-territorial or global dimension).

SMALL STATE CONSIDERATIONS

- The 'ecology' of small scale is bound to affect or impact upon the Human Resource Management system and practices at Ministries of Education based in small states.
- The influence, if any, of such mechanisms as the 'takitaki' system (the bearing of gifts) on decision-making remains largely a matter of speculation.
- There are serious difficulties in identifying or tracing scholarly sources to corroborate or substantiate the case material of small state 'goings on': non-written coda are standard.

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Introduction

It is explicitly recognised that no organisation can attain its goal without labour of the right quality and quantity ... Thus, an organisation must invest in the development of its human resources. (Singh, 1992, p. 131)

The practice of Human Resource Management (HRM) varies from country to country and from one organisation to another. It is, therefore, critical that caution is exercised when attempting to transfer HRM systems across contexts. Singh (1992, p. 129) furthermore advises that HRM is profoundly influenced by the specific traditions and circumstances in place in firms or countries in which it is practised:

... the very meaning and importance of such [HRM] concepts will differ depending upon the special characteristics of the country in which they subsist ... every society will have some ideas as to what it considers to be the nature and purpose of HRM, but these will differ depending upon the nature of that society.

This is not, however, to exclude the possibility of tracing common contextual features across firms, regions or countries which impinge on the practice of HRM in broadly similar ways. Based on this premise, I wish to put forward the contention that HRM systems and practices in small states indeed have their own peculiarities. I shall attempt to illustrate this through a brief but close personal examination of the HRM system and practices in the Ministry of Education in Tonga. I shall also focus on how the 'ecology' of small scale affects or impacts upon the HRM system and practices at the same organisation.

The ecology of smallness

A number of recent studies have established a growing body of knowledge relating to the behaviour of citizens and workers in small states – be they small island states or small landlocked ones. Many recent contributions in this field have revealed a commonality in the sense that small, often island, states face a number of challenges and constraints in various aspects of private and public life which may not be identical, in form or extent, in larger states. Such scholarly research includes texts such as Baker (1992) on public administration; McKee and Tisdell (1990) on economic development; Lockhart and Drakakis-Smith (1996) on tourism; and King and Connell (1999) on migration. Clearly, many of the issues facing such small states are typically somehow different than those impinging on their larger counterparts in the world; they therefore merit a specifically fine-tuned framework of analysis.

Specifically, literature in this field portrays small states as harbouring an 'ecology' of their own. This reconfigures the challenges and constraints that they typically face. The resolution of such challenges has bred a whole range of metaphors and typologies: these include vulnerability, scarcity of resources, hypothermia, a colonial administrative legacy, diseconomies of scale, peripherality, monocrop economics and a disproportionately huge public sector (for example Fischer and Encontre, 1998; Scott, 2001, pp. 245–6). What is clear is that issues which may not even be considered in a large state as either substantial or significant are magnified and more acute in small states. It is, therefore, no surprise to find that even HRM practices in small states such as Tonga are faced with a number of different challenges which may not be so noticeable in large countries such as the UK, France or the USA.

In this chapter I shall attempt to focus on some of the characteristics of small states, drawing on a specific typology proposed by Baldacchino (1997, pp. 67–79) consisting of the identification of monopoly, intimacy and totality as 'voice options' and emigration as an 'exit option'. I will explain the relevance of this conceptual framework by illustrating how it helps to describe and analyse the dynamics of specific HRM practices in the Ministry of Education in Tonga.

Monopoly

HRM practices within the Ministry of Education in Tonga are no exception to the challenges and constraints typically faced by its counterparts in the world. One of these is the limited pool of human resources available to cater for the varied needs of the Ministry. This has sometimes led to a limited number of specialists laying claim to expertise and therefore monopolising the field in which they profess specialisation.

In selecting and recruiting both teaching and non-teaching staff, the Ministry has often been obliged to survey its options before taking on board new staff. More often than not, the decision on who to recruit becomes a matter of opportunity cost. That is, having to recruit specialists such as an expert in curriculum development would mean forgoing the option of recruiting a teacher. Under the constraints of a limited budget, the recruitment process is often a case of losing out on people who might have been good teachers and vice versa.

The decision as to which type of staff to recruit (that is, a generalist or a specialist) is often a concern of the selection panel. On one hand, recruiting generalists means that the Ministry has people who may be more flexible in moving from one post to the next. It also means, however, that there is a lack of specific skills that may be required for specific jobs such as designing an examination or constructing and developing a curriculum. On the other hand, recruiting more specialists can lead to overcapacity, since there may not be enough demand for their services in a jurisdiction as small as Tonga (Bennell and Oxenham, 1983). A case study undertaken by Bray and Packer (1993) of the staffing of the Curriculum Development Unit at the Ministry of Education in Tonga for the year 1987 revealed that altogether 29 staff members were assigned specifically to the national curriculum development process. For such a large number of specialists in proportion to the total population of the country (which was then about 97,000), the diseconomies of scale are much more salient. This problem has also been recognised by Bray (1991a, p. 511) who argues that: 'small states need most of the basic types of specialist personnel required in medium and larger states, but they need them in smaller numbers'.

In addition, some of these specialists may, in the long term, begin to lay claim to expertise in the field to which they belong, carving out a comfortable niche for themselves in the local labour market (Baldacchino, 1994a). This in turn creates a certain degree of rigidity in career pathing which may limit their future occupational mobility. At the Ministry of Education some of the staff working in specialised fields, such as curriculum development as well as examinations and assessment, often find themselves blocked from further promotions within their field of specialisation. Unless they are willing to relinquish their tenacious hold to their claim to expertise and take up other alternative general posts upon promotion, they often find themselves blocked in their career paths. This can lead to low job satisfaction, lack of motivation and even a valid excuse to seek early retirement. The Ministry of Education remains as yet unlikely to develop a policy capable of ensuring smooth mobility for such specialists.

Another issue which arises with respect to recruiting specialists relates to retraining. By laying claim to expertise, specialists in a given field may not take easily to further training. To some of them, the acquisition of a first degree, for instance, is only a means to a further end. Once they claim expertise, further training is sometimes no longer viewed as necessary for further professional development.

To alleviate the problems of a labour market where there is an ease of achieving monopoly by either generalists or specialists, various writers in the field have proposed certain measures which should provide some guidance to the HRM policies of the Ministry of Education in Tonga, even though the Ministry may find it difficult to strike the right balance between the two as its needs and priorities change from time to time, as does the pressure brought to bear on incumbents within it by suitors and seekers. Baldacchino (1995) proposes the concept of 'flexible specialists'; while Bray (1991a) similarly suggests multi-skilling where there is greater flexibility in moving from one job to another. Farrugia and Attard (1989) have also proposed the need for educational administrators to take on a multifunctional role. Although this sounds feasible in theory, it can easily lead to the existence of many Jacks and Jills of many trades but masters and mistresses of none.

Job rotation is one of the methods used by the Ministry of Education in Tonga to counter such a problem of specialists laying quick and easy claim to a particular territory. Bray (1991b, p. 85) has quoted a senior official at the Ministry of Education in Tonga who claimed that the Ministry has a greater tendency to allow individuals to start specialising upon recruitment '... so that they can at least become masters [sic] of limited fields and can build up their self-confidence.' This latter observation is the Ministry's justification for exposing staff to early specialisation so that later on they may be able to tackle other more general jobs where and when required. Job rotation has been adopted as a means to self-development and growth, thus reducing monotony and boredom. At the same time this creates a certain degree of flexibility so that staff, both teaching and non-teaching, may move relatively easily from one post to the next when the need arises. A case in point is the job rotation for secondary school principals. They are posted to secondary schools for a number of years and then are once again posted back at the central office as Chief Education Officers - the equivalent administrative position - so that they can update and familiarise themselves with current developments in education before they are re-posted back as school principals. This system has been adopted as a means of encouraging growth, development and enhancement of staff professionalism when promotion prospects are limited.

Another possible avenue for creating greater flexibility is suggested by Charles Handy (1990) who suggests that any organisation which believes in achieving its goals must create greater diversity in recruitment and employment terms for its demand for labour. On a similar matter, Goss (1994) suggests the two principles of numerical and functional flexibility. In the former, the organisation limits the number of its employees to its most basic and essential functions and then tenders out its less essential ones to private firms or to daily paid labour. In this sense, a greater balance may be struck between generalists and specialists in an organisation such as the Ministry of Education, and greater economies of scale can be obtained by becoming a client to outside contract labour. The second type of flexibility encourages the practice of multi-skilling, where employees are encouraged to each acquire a different range of skills, thus limiting the need to recruit more workers on payroll. All in all, it is important that the Ministry of Education in Tonga realises that there are alternatives which it can consider when it is contemplating manpower planning.

Intimacy

Another characteristic of small states, which also has a considerable impact on the HRM policies of the Ministry of Education in Tonga, is that of intimacy. Writers in the field have acknowledged the difficulties in taking decisions in a society where almost everybody knows everybody else, or knows someone who does. This in turn renders anonymity in decision-making virtually impossible.

In Tonga, selection and recruitment into the teaching force is prescribed by the 1974 Education Act as the sole responsibility of the Minister of Education. As such, the relative ease of access of relatives and friends to the Minister may make it impossible for the latter to decide objectively once the recommendation of the appointed selecting panel is forwarded to him. On the other hand, rejecting the request for recruitment of a close friend or relative may be taken personally against the Minister, since everybody knows that the final decision lies within the Minister's discretion.

For non-teaching staff, the jurisdiction over appointment, promotion and dismissal rests with the Civil Service Staff Board. The strength of the grapevine, however – what Tongans refer to as the 'coconut wireless' – also renders anonymity of decision-making at the Board level vulnerable to exploitation by friends and relatives. In some cases, even if people do not know the members of the Board personally, networks are cultivated so that friends of friends can gain access to these members and hence can try and influence the outcome of their decisions.

An often viable source of contact is through what Tongans refer to as the 'takitaki' phenomenon, a system that occurs when one does not know anybody in the sphere of influence. In this case, the network system is once again utilised but the crucial difference is that the potential recruit, sometimes together with family and friends, takes a gift to an influential person's house to try to influence the outcome of the decision on recruitment. This gift may be in the form of money, but normally it is in the form of food or Tongan goods of cultural value such as 'ngatu' (tapa cloth) and mats; hence the word 'takitaki' which is translated as 'something carried in the hands'. The extent of the influence of such mechanisms as the 'takitaki' system on the outcome of decision-making still remains largely a matter of speculation. What is important is that, once decisions are made public, a legitimation and rationalisation of how such decisions were made is bound to follow very quickly; 'coconut wireless' does the rest – spreading judgemental gossip far and wide, invoking either positive or disparaging remarks.

Intimacy also impacts on other areas such as staff appraisal, staff training and further education for personnel of the Ministry of Education. In staff appraisal, for instance, the rate of subjectivity is, more often than not, highly affected by the level of intimacy. A superior whose subordinates are close friends is bound to rate them highly, often as a means of retaining loyalty and a certain measure of control. In other cases, this is done in return for favours. A real life example happened in 1996, where a teacher in one of the outer islands, who had consistently been identified in previous years to be performing at an allegedly unsatisfactorily low level, was suddenly reported to be highly commendable. Upon a close investigation into the matter, it was found that the officer who had undertaken the appraisal for this particular teacher had been receiving 'takitaki' from the latter. It was later discovered also that the latter had been receiving goods from grateful villagers for her service in providing extra tutorial lessons to their children sitting the 11+ examination into the secondary school level.

On the other hand, a superior who strictly follows set criteria and rates a subordinate much lower than the latter's expectations is liable to solicit a certain degree of animosity, thus affecting working relationships in the long term. Such can be the negative influence of intimacy on HRM in small states.

In terms of staff training and further education, intimacy, in terms of networks, patronage and contacts, also influences decisions on the training needs of the Ministry. In Tonga, the situation is often such that at times, it is not who and what a staff member is that win them an opportunity for training, but *who* they know. Despite the outward attempts of officials to make the selection process impartial and fair, the bottom line is very often strongly nuanced by who they know. Despite this tinge of nepotism, however, this practice may have a positive influence. Officials who are in supervisory positions often know their subordinates better than anybody else so they are often in a position to make sound recommendations based on this knowledge and from their past working experience with the staff involved.

Donor countries or organisations that fund overseas training opportunities have recently been pressing the Tonga Government for a more transparent selection system. This has resulted in candidates' application papers being coded before being brought to the panel for their deliberations to avoid nepotism and to try and ensure a selection process based much more on merit than patronage and personal knowledge.

In view of the issues discussed above, it is perhaps fair to say that intimacy in a microstate such as Tonga indeed impacts on many decisions regarding various functions of HRM policy at the Ministry of Education. The relative accessibility of senior officials to their friends, relatives and the general public makes anonymity in decision-making difficult to maintain. Hence, officials in small states can be compared to those living in a 'closed world' or a total institution like a prison, where escape is virtually impossible. As Wallace (1973, pp. 1–2) sums up the situation:

> ... *communication between insider and outsider is relatively scant; escape routes are shut; a stifling, claustrophobic, psycho-social environment settles in where members' every movement is scrutinised.*

Attempting to operate a systematic, fair and bureaucratic HRM policy at the Ministry of Education in Tonga is thus almost virtually impossible. As Baldacchino concludes (1994a, p. 45): 'intimacy is difficult to avoid, privacy difficult to defend'.

Totality

Like many of its counterparts in other parts of the world, the archipelagic microstate of Tonga, with its 170 islands, 40 of which are inhabited, did not escape the colonial administrative legacy. A highly centralised Civil Service, staffed by about 5000 personnel, is part of this legacy. In 1995, 1366 of the approximately 5000 civil servants in Tonga worked for the Ministry of Education (Government of Tonga, 1996). Of these 1366, about 60 per cent worked on the main island of Tongatapu. The remaining 40 per cent were deployed to the outer islands. What implications does this have on the Ministry of Education's HRM policies and practices? How does the concept of totality fit in?

The notion of totality prevails where attempts are made to create miniatures or replicas in outlying islands or rural areas of services offered on the main island or town. In large metropolitan countries, this process can be a natural part of a decentralisation process and may be affordable in terms of economies of scale (Baldacchino, 1995). In small states such as Tonga, however, attempts to replicate services have often led to very expensive arrangements. The relative scarcity of financial, material and human resources which can be used to offer and maintain quality services to outer and remote islands impinges on the quality of HRM strategies deployed by the Ministry of Education.

Not all of Tonga's 40 inhabited islands have schools; but in those where there are children falling within the compulsory school age (6–14), the Ministry makes a conscious effort to provide a maximum number of teachers to cater for these students, including teaching composite classes. Thus, government's compulsory education policy makes it imperative to increase or maintain access by providing for both capital investment and recurrent expenditures. The latter includes the necessity of providing and deploying teachers and senior officials to the islands on which there are students of compulsory school age. To some, this may appear to be a relatively easy task in relation to the size of the country. In practice, however, the Ministry faces considerable difficulty in trying to maintain its services in the outer islands, even at the most basic level.

In terms of staff deployment, senior officials involved in the annual transfer exercise of the Ministry are always challenged by a number of issues. For example, the numerical domination of female over male teachers has made it increasingly difficult to post single female teachers to outlying islands due to socio-cultural reasons. As a result, as well as for other reasons, the Ministry created in the late 1980s a policy of positive discrimination in recruiting male teachers and teacher trainees to the Institute of Education, although the situation did not improve subsequently (Government of Tonga, 1996). In addition, teachers who have been posted to outer islands for long periods of time request to return to the main island of Tongatapu after a while, particularly when they get tired or bored with living in relatively more difficult and isolated conditions.

In addition, teachers' changing attitudes have made it more difficult for the Ministry to devise an appropriate scheme that would motivate them to take up postings in the outer islands. Some tend to give up easily due to absence of more popular forms of entertainment or less access to common consumables or material goods, apart from family and social reasons. Some even find convincing excuses to evade a policy instituted by the Ministry stating that teachers must serve up to three years in the outer islands during their service. For all these reasons there is often an acute shortage of staff available to be posted to outer and remote islands.

Obviously, the Ministry of Education has attempted to create the necessary infrastructure to give all the children of Tonga, irrespective of their geographical location, access to compulsory education as required by law. On the other hand, maintaining such services in the long term, although considered to be a means to achieving social justice, may become too expensive in the face of continued budget cuts and strains in available resources. Where government fails to deliver, however, foreign aid donors may step in – an initiative which will perpetuate the country's increased dependency on unsustainable overseas aid.

Emigration

Emigration for such small states as Tonga in the past was often considered negatively as a brain drain where much of the limited pool of skills available to the country was permanently and tragically lost to metropolitan countries. Today, it is considered as an export commodity in the sense that it generates revenue to the exporting country in the form of private remittances (Kingdom of Tonga, 1975, p. 284; Bennell and Oxenham, 1983, p. 16). The emigration phenomenon has also been considered a safety valve for rapid population growth. At the same time, it provides the only realistic solace when the claustrophobic effects of small state living start to take their psychological toll. Various senior officials in influential positions take up this option. Most likely to pursue this strategy are young graduates who find themselves promoted to high positions of authority but who may find themselves frustrated after a number of years due to a lack of further promotion prospects. Unless the Ministry of Education finds alternative ways of motivating these young members of staff, emigration looms on their professional development horizon.

When looking at the Ministry of Education in Tonga, it is relatively easy to see the effects of emigration on HRM policy outcomes and practices. Due to the limited pool of skills available in the country, emigration, although a potential source of income in the long-term, impacts heavily on staff deployment. Highly qualified persons leaving the service may be hard to replace in a short period of time. This may result in they being replaced with less qualified persons, causing a mismatch of job with incumbent. Or else it may take a longer period of time before they are replaced, leaving the position vacant. Such a situation often costs the Ministry a number of posts since state policy stipulates that a vacant post has to be filled within three years. Failure to fill in the vacancy will result in the permanent termination of the post. The post may then only be reinstated after proper negotiations with the Establishment Division of the Prime Minister's Office and Treasury if the need is considered to be genuine.

If the Ministry cannot identify a suitable person from within its own staff pool, 'poaching' is carried out, where a specific person is identified and 'head hunted' from outside, often from other ministries. This may be easier said than done, as often the Ministry finds that it has to compromise in certain ways in order to entice potential outside recruits. The obverse occurs when other ministries 'poach' staff from the Ministry of Education, leaving it in need of appropriately qualified personnel.

A way forward

The Ministry of Education in Tonga faces a number of challenges in HRM because it does not operate on the same scale as its counterparts in larger countries. Insularity and parochialism become potential sources for greater intimacy. The existence of a 'total environment' often obliges decisions regarding HRM policies and functions to be much more strained and difficult than in a larger states. The monopolisation of certain skills by specialists laying claim to expertise in the local market challenges policy-makers as to how many of these so-called specialists they should recruit and retain in the long term. Hence the call for greater flexibility, for multiskilling and for multifunctionality to create better use of scarce resources while respecting people's ambitions for power and career upgrade. Furthermore, the Ministry's struggle to implement its compulsory education policy is constantly challenged by the shortage of personnel willing to work on the remote and outer islands. Finally, we have also reviewed the impact of emigration on the HRM policies and practices of the Ministry of Education to the extent that it acts as a drain on the existing pool of skills available to the country, resulting in a mismatch of post to person as well as in poaching.

Exactly what kind of HRM strategies should be employed to exploit economies of scope (rather than scale) and to ensure that the achievement of the Ministry of Education's goal will understandably be contingent on the circumstances existing at the time of policy formulation. Importing foreign HRM systems on a wholesale basis from a metropolis will be detrimental to a certain degree in terms of relevance and applicability to local situations. But Tonga cannot afford to lag behind current and ongoing developments in HRM on the international scene because of its openness to market forces and operations taking place elsewhere in the world and the globalisation of the world economy. What may be needed, however, is what Baldacchino (2001) refers to as 'street wisdom' and a dose of 'good sense': a situation whereby policy-makers at the Ministry of Education realise the specificities faced by small states such as Tonga and use this knowledge to devise the most appropriate strategies relevant to the country's situation. Ignoring such considerations invites disaster; acknowledging them from the outset may be the only suitable way forward for HRM policy-makers in education.

A postscript on methodology

This chapter has tried to outline how the inhabitants of many small societies value information and its sources; to this effect, it becomes critical to cultivate, screen or defend contacts as important political resources in their own right. In order to do so, it may be necessary to camouflage sources, or else to produce sensitive material in a format which inhibits its circulation. This is one reason why so much information in small societies is stored cerebrally and orally rather than in writing (Baldacchino, 1997, p. 73).

This presents obvious difficulties when it comes to producing academic work. Much scholarship is predicated on references to data and on empirical sourcing of relevant information. This is inherently problematic when the only sources of 'data' are personal experiences or firsthand privileged information that is however not, and cannot be, documented. For these reasons, certain statements in this essay do not come along with the references one would expect in order to be corroborated, as is standard procedure in other contexts. The dearth of references, especially to local material – official documents, newspapers, articles in academic journals written by local authors – in this paper is thus no fault of the author, because the material would be compromising of its own nature and therefore does not exist in an easily retrievable format. This chapter, indeed this whole book, should help to expand the scant published literature base on the 'goings on' in small systems.

DISCUSSION POINT

- Is it suitable to go for recruitment and selection procedures that seek to completely eliminate, reduce or enhance the influence of personal knowledge of the applicant by the selection panel? What are the pros and cons of each of these options? And can each of them be effectively implemented in a small states environment?

4 Considering Total Quality Management for Schools in Malta

Anthony DeGiovanni

KEY ARGUMENTS

- Implementing a Total Quality Management Function is much easier said than done, especially in services run by bureaucratic organisations and hierarchical structures – as are typical educational systems.
- Two basic features of TQM stand out and have relevance in an educational context: the primacy of customer satisfaction and the necessity of tapping non-traditional resources (especially employee ideas) to institute or enhance quality. But transforming such principles into effective TQM practice can be daunting.

SMALL STATE CONSIDERATIONS

- Consumer choice in education can be difficult to achieve in small states where free, open markets are lacking and where there is a natural disposition towards few, monopolistic service providers.
- Management models and consultants borrowed from other, typically larger, countries have their obvious attractions: these include

> **avoiding petty local jealousies and crises of legitimacy. But a genuine TQM function must be embedded in a TQM culture; cultural changes must be accepted and ultimately owned by, but never imposed on, their exponents.**

A cautionary note

The interpretations of Total Quality Management are as numerous as the literature that expounds them. A definition offered by Schonberger (1990) speaks in terms of 'quality of goods, of services, of time, of place, of equipment and tools, of processes, of people, of environment and safety, of information and measurement', stressing the scope of the quality function, rather than its actual substance. Collard and Siver (1990) emphasise the principle of continuous improvement (in Japanese, *kaizen*) to the quality process, playing down the technical aspects and putting forward awareness, understanding, motivation and commitment of employees at all levels.

Shorn of its rhetoric, however, TQM may prove surprisingly hollow. Some analysts sense an ominous aura in the concept of totality emphasised repeatedly in TQM: 'involving everything and everyone ... all systems and processes' (Saylor, 1992). Dobyns (1994) argues that 'Quality has no accepted definition' while Dennis (1995) remarks that the attraction of TQM benefits from 'pseudo, Zen-like characteristics'. Its remit ranges from the bland 'customer delight' (Roberts and Sergesketter, 1993) and its equation with customer satisfaction (Unterberger, 1991); Juran (1989) calls TQM 'fitness for purpose' while Crosby (1979) prefers 'conformity to requirements'. Calling TQM just 'what the buyer says it is' or 'I know it when I see it' is equally enigmatic (Dobyns and Crawford-Mason, 1994).

This paper adopts the perspective that 'quality' is a frame of mind, an attitude of striving for the best, continuously seeking not only to meet, but to exceed, expectations on product and service. TQM is usually seen as based on two tenets: the primacy of customer satisfaction and the necessity of tapping non-traditional sources (especially employee ideas) to institute or enhance quality. Certainly, this is a mentality well suited to the sphere of education and its purported contribution to human resource and personality development.

Three models of quality

The three most respected and quoted gurus in the TQM literature remain Deming, Juran and Crosby. A synthesis of the ideas of these three exponents forms the basis of what is generally understood by TQM (McManus and Hutchinson, 1996). The six key organisational requirements emerging from these ideas are:

- commitment and example from senior management
- awareness of total cost of quality
- knowledge of the tools and techniques of total quality
- understanding of customer specifications and satisfaction
- the pursuit of continuous improvement
- a belief that everyone has a responsibility for quality.

Apart from his check-list of 14 points, intended as exhortations to management about what to do and what not to do if an organisation really wants to prosper, **William Deming** is often quoted as identifying seven 'deadly diseases' which to him encapsulate the resistance to the new TQM approach. Two of them, exorbitant medical and legal litigation costs, can be seen as peculiar to US culture. The other five, however, are more generally relevant. The first is a lack of consistency of purpose which, according to Deming, is the most pernicious because it prevents an organisation from adopting quality as a management objective. The second, closely linked, is short-term thinking that goes against the long-term vision and development of a culture of change. The third disease identified by Deming is the evaluation of individual performance by means of annual reviews or merit ratings. His opposition to performance appraisal schemes is based on the belief that these provide a misleading idea of what is of importance in the process. It also engenders competition rather than team spirit. The fourth disease is job-hopping, that is, high turnover and loss of executive talent (Deming, 1986).

Deming also distinguishes between *common* and *special* causes of failure. Common causes are attributable to systemic failings which are internal to the processes of a particular institution. These can be typically resolved or reduced by changes made to organisational systems, processes or procedures. In contrast, special causes are external to the system which are more difficult to control; they produce non random variations within the system.

Joseph Juran's key contribution to the TQM debate is his belief that most quality problems can be traced back to management. Juran's rule of thumb is that 85 per cent of an organisation's quality problems are the result of faults in the design of processes, and consequently can be traced to management. The approach he developed is called Strategic Quality Management (SQM), which is a three part programme based on different levels of staff. The senior management that should embrace and embody the strategic view of the organisation, the middle management that takes care of the operational side of quality, while the workforce itself is responsible for quality control. Juran believed in the principle of quality improvement by practical application through a project-by-project team-solving approach (Juran, 1989).

Philip Crosby has formulated his own 14 steps to achieve Quality, which are very similar to those listed by Deming (see Table 4.1). His name is, however, most readily associated with two quality ideas. The first one is that 'quality is free', meaning that money spent on quality measures is actually a good investment, giving an abundant return through money saved by curbing wastage. His second idea is that all factors that diminish quality can be eliminated if the particular institution has the will to arrive at *'zero defects'*. For Crosby, there is only one standard - perfection. 'Zero defects' remains a standard which is harder to apply in the services sector - which includes education - because of the greater human element involved. Nevertheless, striving for perfection is the name of the quality game (Crosby, 1979).

TQM and education

TQM is a philosophy of continuous improvement which can provide any educational institution with a set of practical tools for meeting and exceeding present and future customers needs, wants, and expectations. (Sallis, 1993)

The Japanese success story made TQM principles increasingly popular among US managers. Starting with manufacture, it soon spread into the service industries and found its way into health and education management.

Table 4.1. Crosby's14 Rules-of-thumb for a Quality Function

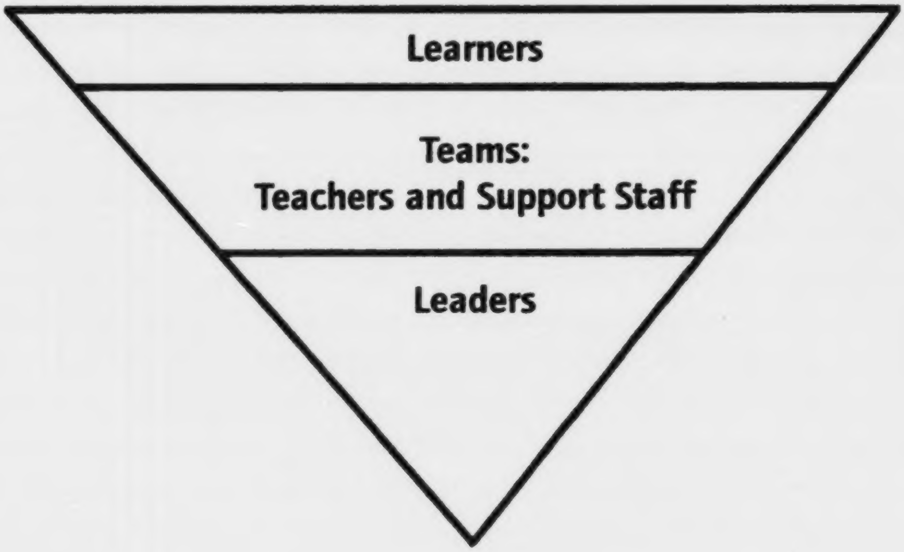
1. Management Commitment
2. Set up Quality Improvement Team
3. Quality Measurement
4. Cost of Quality
5. Quality Awareness
6. Corrective Action
7. Zero Defects Planning
8. Supervisor Training
9. Zero Defects Day
10. Goal Setting
11. Error-Cause Removal
12. Recognition
13. Quality Councils
14. Do it Over Again

The same survival notions that convinced American business to do something about their loss of markets, also put pressure on the American education system when it was felt that the standards of educational achievement compared negatively with those of other countries (Griffith and Medrich, 1992). Coupled with this was the growing awareness of cost effectiveness when citizens increasingly queried public spending. Authors like Hanushek (1994) defend this clear economic response to educational reform: 'Some have argued that schools are too important to be subjected to economic rigour. We argue that, on the contrary, they are too important *not* to be.'

Workplace changes based on the ideas of TQM could be condensed into four categories: positive customer relationships, employee empowerment, continual gathering and use of statistical data, and the creation of an environment promoting unity and change. Adapting TQM to educational settings can mean changing teacher and student roles and student evaluation philosophies. Students may be asked to track their own records, influence their own education and operate their own school-based business, while the school assigns less importance to grades and standardised tests in favour of continuous evaluation. Since the students are much more intensely engaged in understanding why they are learning and participate in regular reviews of the curriculum, they can directly influence future curriculum as well as its delivery.

TQM in schools: the upside-down organisation and customer focus

The above examples suggest that the key to a successful Total Quality culture is an effective internal/external customer-supplier chain. This concept is rather hard for traditional bureaucratic organisations based on hierarchical structures to grasp and requires a change of culture. The first characteristic of such traditional set-ups that must be done away with is *status*. The role of the senior and middle management in a TQM culture is to support and empower the teaching and support staff and the learners, rather than controlling them. This is best graphically illustrated by the inverted pyramid ideas of Karl Albertcht (1988). The inverted pyramid clearly indicates the shift in TQM philosophy towards a clear customer focus:



Contrary to what might be interpreted superficially, the upside-down organisational focus does not in fact run counter to the essential leadership role of a head of school or other senior educational leaders. Nor does it affect the authority structure in the school. What it does illustrate is the focus put on the customer in the school and the importance of the service-giving relationship. It highlights the primary mission of a TQM-driven institution which is to meet the needs and wants of its customers. However, this is problematic, firstly because many customers are often not well informed either about the service or what constitutes its quality. Secondly, expectations can vary greatly and are often contradictory. Thirdly, the reputation of a school is often confused with the quality of its teaching. Fourthly, the learners' perception of quality changes as they go through the process offered by the institution. Fifthly, the same customers contribute to the quality of their own learning.

The customer focus also includes meeting the requirements of the internal customers since, as a workbook for the Malta Public Service dutifully reminds us, colleagues within the institution are also customers (Management Systems Unit, 1995). Every member of a school staff is both a customer and a supplier; internal customer relationships are vitally important if the school is to function well. 'The next-in-line analysis' is a useful technique, helping members of the staff to identify the people to whom they provide services also as clients. It is the staff who can make the quality difference because they produce good teaching and satisfy clients. 'Internal Marketing' is a tool by means of which staff are kept informed about what is happening in the institution and at the same time receive the necessary feed-back.

Implementing TQM: five tasks

Five important features are required to create a successful TQM organisation which achieves quality improvement:

- Alignment within the organisation and commitment on a shared view;
- An understanding of the customer-driven and process oriented-basis of quality;

- An organisation designed around teams, with investments made in team development and changes made in performance management systems to reflect teamwork as the basis of the organisation's activities;
- The setting of particularly challenging or outrageous goals, which commit the organisation to significant increases in performance outcomes;
- The systematic daily management of the organisation through the use of effective tools for measurement and feedback.

The three Cs of TQM

An effective TQM school can be said to be endowed with implicit qualities, also called 'soft qualities' (Ott, 1989). These can be summarised as the 3Cs:

Culture – A successful TQM school is one that has a culture in which innovation is highly valued, status is secondary to performance and contribution, leadership is a function of action, not a position, rewards are shared through the work of teams, development, learning and training are seen as critical paths to sustainability and empowerment to achieve challenging goals is supported by continued development and success.

Commitment – One must acknowledge that teachers are usually very committed to their specialisation and the class they teach, but not as much to shared goals for the whole school, and even less so to those of the whole system of education. In this respect, TQM processes offer a valid contribution.

Communication – A successful TQM school is one in which communication within and between teams is smooth, powerful, simple and effective, basing itself on facts and genuine understanding rather than rumour and assumptions.

Educational leadership and TQM

For any TQM process to happen in schools, three important ingredients seem to be necessary: trust, leadership and empowerment. Trust must be earned and secured through a continuous commitment to integrity. It is the basis on which many aspects of the culture of the education organisation depend. Trust is also a hallmark of effective school leadership, as a leader needs to be seen as a holder of a position of responsibility, inspiring, provoking, confronting and challenging people to work to the best of their ability and constantly urging them to improve their ability. Rather than interpreting leadership as controlling and ensuring the implementation of a policy, heads of school need to secure a 'sense of visionary possibility' in their school.

This kind of education leadership is very different from the traditional forms of headship in schools. The TQM headship for schools is about imagination, about enabling and empowering the staff, rather than merely a position of status. The TQM head of school activates, coaches, guides, mentors, educates and supports his or her colleagues so that they can focus on a shared vision, strategy and a set of intended outcomes. The head needs to realise the cost-effectiveness of empowering those nearest to the process to manage the process themselves. They need to concentrate on the whole perspective and keep it to the forefront of their staff's thinking. Heads of TQM schools search for the small things that can make a difference and also appreciate the importance of a sense of humour! The above approach is viewed as a radically different philosophy of leadership and management, representing what can be seen as a major change in leadership style.

The quality of learning

The learner is the primary customer: unless learning styles meet individual requirements, a particular school can never claim to have achieved total quality. TQM needs to address the quality of the learners' experience if it is to be of any relevance to education. Each particular learner has a particular learning style. Consequently a school taking the quality of learning seriously needs to consider this issue carefully and to formulate strategies for individualisation and differentiation in learning. As rightly pointed out by Sallis (1992), much work still needs to be done to find out how to apply TQM principles in the classroom.

TQM and Maltese education: a critical discussion

Total Quality Management has yet to become a key principle and household word among the teaching profession in Malta. Nevertheless, under diverse guises and from a variety of venues, a considerable number of related concepts have been seeping through. The rest of this paper discusses how the concept of 'quality education' is evolving in Malta's educational system, which in many ways is typical of other small island states.

The era of informatics has made news travel faster. Innovation in other countries serves as model for whatever change we might wish to achieve. Traditionally, this dependence was on the British model, but now the 'national dichotomy' is increasingly shifting towards continental Europe, particularly in view of the Malta Government's aspirations to join the European Union.

This external dependence is, however, being constrained to some extent because the University of Malta gives this country an edge over other micro-states with 'topless' systems of education. This is especially so since a considerable amount of pertinent, locale-specific, educational research is being carried out and there is also a well-established local system of examination and assessment.

The Malta Government also recruited a number of foreign consultants to implement desirable reforms in the public service, especially in the early 1990s. The structure of the educational system has been radically reorganised as a result. Some of the changes have impinged on the schools' administration and should make some impact also on the quality of teaching. Very often, the principles underlying such imported changes are apt to be absorbed superficially, because the necessary change of culture is slow to materialise. On the other hand, well-paid foreign consultants generally have more credibility than local experts and are usually keen to prove their worth (Farrugia and Attard, 1989). However, they may be too quick to dismiss local critique as an expected resistance to change and consequently they often miss the necessary reflection on how their innovations might impinge on an idiosyncratic insular micro environment which they are not likely to consider in any way peculiar. At the same time, impatient local reformers are apt to try their best to implement whatever change is most fashionable at the time and to associate themselves readily and uncritically with the expert bandwagon.

The myriad changes implemented in quick succession usually either enjoy a short-lived existence or become so eroded as to merge imperceptibly into the traditional, seemingly static, local educational scenario. One such example is the school councils experiment which originally emulated similar contemporary developments in Britain. However it never really managed to get off the ground. Participation in the election of parent representatives has nearly always been scanty as has that of teachers. One could come up with several reasons for the failure. The point is that by the time serious thought was given as to how to involve parents and other stakeholders, there was enough post-implementation critique from the model country to ensure that the characteristically sensitive dependency wind vane of our small state quivered in perennial indecision. Another initiative of the Department of Education, the Primary English Project (PEP) and its twin Schools In-service Development (SID) which made use of some characteristic 'quality concepts' and *kaizen* techniques, tapping the grass-roots for ideas, brainstorming, use of teams or total commitment from its leadership, was snuffed out in the aftermath of recent reform.

One might argue for quality management as a response to educational changes. The two most important documents presented recently to the local education world, *Tomorrow's Schools* (Consultative Committee on Education, 1995) and *A Quality Education for Malta* (Mizzi, 1996) can be considered as a worthy response to change. On the other hand, both documents can be perceived as tools for change in themselves. Both spell out very well what should be done, but not how it can be done; both tackle in an admirable fashion very important and pertinent issues, but very rarely place them in the wider context of the environment in which the schools operate.

At this point in time, when the reform is still under way, it is difficult to judge how schools are responding to the many changes that are being projected upon them. It remains unclear to what extent school autonomy is being promoted; nor is it clear whether parents' choice of their children's school will ever determine the school's income in the form of formula funding. The traditional role of supplier and customer has not changed perceptibly. It is not the parents, but the system, that selects the school for the children through catchment areas, selective examinations or even 'drawing by lot' (for entry to local church primary schools). Monopoly is one of the main characteristics of a small state. Can the consumer revolution, where monopoly suppliers no longer determine the production but where the power of consumers is the key driving force, occur also in the context of the education system of a small state? There are clear traces of a consumerist society in Malta, but not so much of organised consumerist interests (Baldacchino, 1993).

The way that parents perceive the quality of education is definitely influenced by whether they are buying it or whether it is offered to them without giving them options. Performance indicators are predominantly of the 'success in examination' type, with occasional benchmarking of quantitative success in national examinations being issued. What point is there in publishing these comparative indicators if there is no option of choice of school except through subterfuges like changing a child's address? The general ethos and climate are increasingly being recognised by parents but very often they limit themselves to praise or complaints.

Parents of state school students in general are excluded from any participation in the decision-making of their children's schooling, despite the considerable rhetoric. If parents are generally excluded from both choice of school and participation in decision-making, what hope is there that Maltese schools will offer a quality education to the satisfaction of the customer without this competitive edge? On the other hand, in a situation where a free market economy works differently in the context of our small state, is it ever possible to liberalise completely the choice of schools? Can one put schooling on the open market in a small state? In bigger countries like the UK, customer expectations are considered one of the driving forces through the economy. Nevertheless, such expectations present a problem in the context of education since what the educational customers really need and what they perceive that they want are not always the same thing. It is often the management's task to align the two.

For historical reasons a discussion of quality education in the local context is confounded by the fact that there is usually no differentiation between the whole system and the particular school. There is a tendency to apply concepts that are usually intended for an individual school to the whole educational set-up and vice versa. In this sense it is not clear whether *Tomorrow's Schools* deals throughout with the system holistically or is focusing on and off on a hypothetical school. *A Quality Education for Malta* also deals in generic terms but not necessarily from the system point of view. This confusion probably arises because of the still-evolving configuration of centralisation–decentralisation of the education system.

The situation is further complicated because of the paradox present in the British model (which Malta tends to copy) where increasing institutional autonomy in 'economic' terms coincides with greater central direction in content and organisation of the curriculum. The proposal put forward by the Minister of Education in his 1996 Budget overview seems to move away from the British model: 'The next important phase of the decentralisation process is to facilitate staff curriculum and whole-school development at school level with the assistance of expert and material support from the central authorities' (House of Representatives, Malta, 1996 Budget Debate).

It might be suggested that the debate should shift from addressing quality education in generic terms to focusing on total quality in the school context. This has the advantage of the holistic nature of total quality which would help engender an integrative approach to the management of all aspects of a school's work, bringing to an end the newly introduced dichotomy between managing and learning. This has also practical implications for the role and perceived status of heads of schools, teachers, non-teaching staff and students.

A school focus would also provide the opportunity for a value-driven school management in which *moral imperatives* are at the forefront (Mizzi, 1996). The continuous improvement commitment of total quality is a powerful tool for the school in terms of student development and learning, while a range of techniques for measuring, analysing and understanding help to improve decision-making and working relations. Finally the TQM focus on the 'customer' makes the school concentrate on its main function as a learning institution.

In practical terms a school might identify its *mission statement*, which is not simply cosmetic or a ritual as the whole school community should be involved in its formulation. This mission statement can then be developed into strategic and development planning, helping to focus staff meetings, training, development and review, as well as serving as benchmark for evaluation.

Total quality thinking might also help focus on educational leadership. The traditional perception of the role of the headteacher has gradually shifted from that of a leading professional to that of a manager. The head needs now to evolve into a leader of learning, putting greater emphasis on team structures and processes, acting as mentor and coach, helping to develop subject leaders and becoming more involved with the management of teaching and learning processes. The Maltese head of school definitely needs to spend more time on evaluation and renewal.

Customer focus is possibly less problematic at school level than at national level. The school can strive towards better communication between home and school and increase parents' involvement in the learning process. Customer focus also increases awareness of social as well as learning processes. A wider use of surveys and reviews can help with the formulation of school policies.

Experience has shown that fault prevention is the most elusive objective in the education context. Whatever methods are tried, a significant number of children still fail. However, attempts at minimising waste by means of *Quality Assurance* include the use of benchmarks as performance indicators, the introduction of competencies for effective management and professional development of staff. ISO 9000 could also be a useful tool for the documentation of the processes, although it might be too focused on systems rather than processes, and it can appear to educational professionals to be too bureaucratic.

There is not much evidence that Total Quality Management is actually being used by a great number of schools in any particular country, although a number of TQM concepts appear under various headings such as 'Effective Schools' or 'School Improvement'. However, the quality concepts and the philosophy associated with TQM has had too strong an impact on the international educational arena to remain unheeded in any local educational context.

DISCUSSION POINT

- What are the modalities of a TQM culture in a small state? How are the three essential 'soft qualities' of TQM – culture, commitment and communication – affected by such features as personalisation, networking, multifunctionality and tendencies towards monopoly?

5 Total Quality Management for St Lucia's Primary Schools

Peter Joseph

KEY ARGUMENTS

- A Total Quality Management programme based on the fostering of teamwork, effective communication, leadership, empowerment, quality assurance, quality control and external/internal audit mechanisms can promote effectiveness in the primary schools of St Lucia.

SMALL STATE CONSIDERATIONS

- A centralised educational system, limited natural resources, inadequate opportunities for teacher professional development, limited expertise of principals, the competitive nature of the educational system and the absence of benchmarks for evaluating school effectiveness are features of small systems which may act to promote or hinder the attainment of school effectiveness.
- Small size can provide logistic advantages; training programmes can be easily undertaken in a small and compact island state like St Lucia. Participants can travel from home to training centres and back on a daily basis.

Introduction

With growing competition and demand for quality in all circles, institutions are becoming ever more aware of, and sensitive to, the imperative to provide a quality service or product to their clients. The very survival and growth of institutions is now often seen to depend on the quality of their output.

A common thread running through the literature denotes Total Quality Management as a practical and strategic approach in the pursuit for continuous quality improvement. Murgatroyd and Morgan (1993, p. 59) define TQM as '... the systematic management of an organisation's customer-supplier relationships in such a way as to ensure sustainable, steep-slope improvement in quality performance.' Steep-slope improvement is an indication of a high measure of continuous improvement in quality. Dahlgaard (1995, p. 445) conceptualises TQM as a 'management process which any organisation can implement through long-term planning by using continuous quality improvement plans which gradually lead the organisation to ... increase customer satisfaction through continuous improvement'. The above definitions stress that, in implementing TQM, meeting customers needs and wants are paramount, all stakeholders are meant to be involved in the process and the implementation process can be effected with a low budget. All of these are attributes likely to benefit both the institution and the customer.

The aim of this chapter is to explore how school effectiveness can be achieved in primary schools in St Lucia through TQM. In so doing, it is important to assert that empirical research confirms how school effectiveness can be attained irrespective of students' socio-economic background. Secondly, specific factors related to smallness and culture may act to promote and/or hinder the attainment of school effectiveness. These include limited natural resources, inadequate opportunities for teacher professional development, limited expertise of principals, competitive nature of the educational system and the lack of a standardised measure for evaluating school effectiveness. Thirdly, it is also clear that TQM is one possible and viable strategy for attaining the goal of school effectiveness. TQM is, after all, suggested as a practical and appealing system of management for institutions; but the desired results are only likely to materialise if structural and cultural changes are also instilled. As we are all aware, real change takes time, and the extent to which administrators and primary school teachers are prepared to support the move towards desirable change is a relevant issue.

School effectiveness can be analysed both as a process and an output. In terms of a process, it alludes to schools that foster innovative practices in the teaching–learning cycle that are aimed towards achieving continuous student improvement. With regards to the output, a school has attained effectiveness if it can achieve increased levels of student outcomes over a period of time.

This chapter proposes a model as to how TQM can promote effectiveness in the primary schools of St Lucia through the development of teamwork, effective communication, leadership, empowerment, quality assurance, quality control and auditing mechanisms. Each of these requirements is reviewed in turn, and assessed in the light of the prevailing situation in St Lucia's primary school sector.

Teamwork

Teamwork lies at the heart of the TQM process: all the other TQM components are ultimately qualities and features that are essential to sustain the work of teams. In the final analysis, it is the teams that will bring desired results and thus they should be the focal point.

There are a number of advantages in organising an education system based on teams. Oakland (1993) identifies some of these:

1. Problems are solved more efficiently because of the greater diversity of knowledge, skills and experiences.
2. Approach is more satisfying to team members and likely to boost morale and ownership.
3. Recommendations are more likely to be accepted and therefore implemented.
4. Teamwork builds trust and improves communication.

5. Teamwork provides opportunities for individual members to grow professionally and psychologically.

Based on this vision of teamwork as the focal point, one can conceive of a model of stakeholder relationships that should contribute to the achievement of effectiveness at the primary school level in St Lucia. This model focuses on teamwork and incorporates the other components of TQM as essential features and qualities to sustain the work of teams.

At the core of the model is the school management team made up of the principal and heads of departments. Each department should have a co-ordinator who forms part of the school management team. Surrounding the management team are the teams of employees, mainly made up of teachers grouped according to department. The other employees (janitor and security officers) form a group of ancillary staff. Around the employees are the clients, who are the students. There is a triangular link among clients in each department, the team of teachers responsible for the particular group of clients and the head of department. On the periphery are the supportive structures that are essential for the survival of the teams; these include the trade union organisations, national and district administrative teams, other schools and the larger community.

One of the teams on the periphery is the training team. For the school team to operate efficiently, there is desperate need for training and retraining. Training should be geared toward equipping management and employees with the skills, tools and techniques necessary for them to perform their respective roles effectively. Training in teamwork is also required since individuals have to learn to work as a team rather than function in splendid isolation.

Teamwork is not just a function of the school staff, but is intended as a feature at the classroom level. Students on a class basis may be organised in groups of four to six students each to work on projects, class exercises or simply to study. In this mode of organisation, students are encouraged to help each other and solve problems collectively and synergetically. They too need training in teamwork, co-operative learning and problem solving. Effective teamwork is also required at a district and national level, in order to support the processes which will ultimately devise strategies for assisting schools in promoting TQM and solving major and/or thwarting potential problems.

Communication

Communication takes place between within and among groups. To list a few examples, within an effective TQM system, communication is expected to flow among groups of employees, among supportive systems on the periphery, between management and teachers and between students and teachers. This depicts a collegial approach in the relationship among groups. Another feature of the model is a flow of bottom-up communication, from the classroom teacher up to the Ministry of Education. In such cases, the concerns and requests of teachers are taken up by District Education Officers (DEOs) to the national team. For example, a need for a resource centre at district level is beyond the powers of the DEO in the present system and such an issue therefore has to brought to the attention of higher authorities. This mode of communication differs from what is normally assumed to exist in an organisation, where information filters primarily from top to bottom in a strict bureaucratic fashion, with minimal consultation and support. In the proposed mode of communication, the authorities will be doing more of the listening, while those at the bottom will be doing more of the talking.

If this model is adopted in St Lucia, it is expected that there would be some form of resistance initially because it calls for a change of culture. Seasoned civil servants may consider the move as an erosion of their traditional authority; while individual teachers at the grassroots may still sabotage the system by trying to exploit it to advance personal grievances and requests.

In the past, communication within the education system in St. Lucia was very often conducted in a top-down manner. That is, the Ministry would send directives or policy decisions to schools informing them of a decision taken to implement a new mode of operation or a new subject area, or informing a school of changes in what was expected of them. Such communication would often be in the form of a memo. Upon its receipt, the principal was expected to inform teachers and to implement the directive.

The District Education Officers were then required to supervise the implementation of the new policy. With TQM, this mode of communication is changing. Since 1998, teachers, students and parents have been given a greater say in decision-making. As part of this process, the teachers' union enjoys representation on a number of statutory bodies established by the Ministry. Student Councils are also encouraged in schools to plan and organise activities for students, and provide representation at higher levels, such as school administration. In addition to these two structures, projections have been made in the Education Development Plan (Government of St Lucia, 2000) to establish school boards for every school. It is envisaged that these school boards will be given a degree of autonomy in the management of schools.

The present Ministry of Education has also demonstrated its willingness to listen to the views of employees and other stakeholders. In the formulation of the Education Act (Government of St Lucia, 1999) and the latest Education Plan, broad-based consultations were encouraged to include all sectors of the education system. The Ministry has also established a Head of Division Committee (HODC) comprising the Minister, Permanent Secretary and the heads of all the major sectors of the education system, including Education Officers. This committee meets monthly to share experiences and plans, and to discuss problems and challenges facing the individual sectors or the Ministry as a whole. This is an excellent initiative since it gives the DEOs an opportunity to raise problems affecting teachers and schools at the highest level, to be informed of new projects and developments, and to learn from each other. What is lacking in this new structure is follow-up action to ensure that the critical issues and problems raised are not only discussed and noted, but that a concerted effect is made to address problems and concerns to the satisfaction of all parties, taking into consideration the constraints of the Ministry.

Leadership

Leadership has a role to play at classroom, school, district and national level in successful implementation of TQM and the attainment of school effectiveness. Before 1999 over 80 per cent of principals in St Lucia had not received formal training in management. Recognising this situation, the Ministry of Education initiated a diploma in school management for all principals and one senior teacher from each school. This programme was executed on a part-time basis over a period of one year, and was conducted by the University of the West Indies. The programme was completed in 2000 and what is now required is to conduct research to determine whether principals are implementing the skills learnt and to what extent they have become better managers. In addition, training should not be viewed as a one-off affair as further training will be required by principals to keep them abreast of new management strategies and to further upgrade their skills and competences.

It is also important that leadership permeates to all levels of an organisation. At the school level, principals delegate responsibilities to teachers – this could provide the latter with valuable leadership experience. Some of these tasks include chairing school committees and grading level leaders. These positions are limited and often the same individual heads more than one group. To broaden the base of experiences, leadership positions may be rotated within and across groups so as to provide as many staff members as possible with opportunities to lead.

This writer benefited from two leadership experiences at the young age of 22, just three years after joining the teaching profession. In the first, he was appointed to head a team of five Grade Six teachers, with all the other members being more senior than him both in age and experience. Two members of the group were actually his past teachers. The second experience in a leadership position came when the writer was elected as the Branch Representative of the St Lucia Teachers' Union for the district of Vieux Fort. This appointment was aided by the fact that most of the senior teachers in that district were reluctant to take on a voluntary leadership role that would commit them to extra hours of work.

Opportunities to lead are also available at the class level. Each teacher is in charge of one class and is required to organise and manage that class in a way that yields maximum results. This task calls for classroom management skills and ability to source and implement innovative strategies and techniques. As expected, some teachers are better managers than others, but in a school climate where collaboration, dialogue and teamwork are encouraged, teachers can learn valuable skills from each other. In the St Lucian context, students are also provided with opportunities to lead at the classroom level. In schools where thrift co-operatives exist, students take up leadership roles in running the affairs of the co-operative. There are also instances where small groups (such as interest or ability groups) are formed within the classroom and students are assigned various roles. Such practices should be strengthened and other areas explored to ensure that all students are provided with opportunities to serve in leadership positions. In addition, students should be taught to work together as a team.

At the level of the district, a change in role is required for the DEOs. These officials supervise schools in their districts, ensuring adherence to rules and assisting principals with administrative problems (Frederick, 1991, p. 192). In the recommended role, DEOs will act as consultants, advising principals and teachers on aspects related to TQM and school effectiveness, and assist school in obtaining their desired goals. Therefore, when DEOs visit schools, principals and teachers should view them as facilitators and not reporters searching for faults (see also Bangale, below). It should be noted that the Ministry of Education has recognised the need to revisit the role of the DEOs and that presently discussions aimed at refining their role are taking place.

In schools, teachers often have a similar negative perception of visits by principals to classes. This stigma or negative feeling may be minimised if principals make 'the development of the teacher' the focal point of their visits and use the data gathered from the evaluation as a basis for assisting the teacher professionally. This intention should be communicated to teachers and they should have prior knowledge of the criteria that will be used to evaluate them. In addition, principals should demonstrate their commitment to this evaluative goal through their actions. Actions speak louder than words (Quirke, 1992).

Adopting such a position at school level also calls for a policy change from the Ministry of Education. Since TQM is a new programme, the mobilisation drive should start at the top with the quality co-ordinator organising training programmes for DEOs and school principals to create an awareness and equip them with basic skills and knowledge on TQM. This should be followed with training for staff on TQM. Follow-up sessions both for management and teachers may be organised as required. It should be pointed out that TQM is not a system imposed on schools by higher authorities but a route that schools choose because of a desire to improve the quality of service. In this light, the education authorities can only encourage and promise support.

Quality Education is ultimately a conviction and some schools are likely to take on the quality challenge soon after their staff receive adequate training. Should such schools be successful in reaching their declared targets, then such successes should be advertised so that other schools can be encouraged to go the quality way.

Sallis (1993) warns that 80 per cent of quality initiatives fail during their first two years of implementation due to lack of senior management backing and commitment. To avoid such situations, the drive for quality at school level should be spearheaded by the management team. As a team they are more likely to succeed since the principal has immediate support and assistance from team members. External support should also be available at district and national level.

Empowerment

It is important to organise the workforce in teams and develop leadership, but if teachers, the employees in direct contact with the clients, are not empowered, the goal of attaining school effectiveness may not be achieved. In Barbados, the Ministry of Education has recognised the need to empower teachers and has articulated in a White Paper how teacher empowerment must be a central plank in a strategy for improving quality (Ministry of Education, Barbados, 1995). Measures proposed to achieve this goal include training, recognition for teacher contribution and review of teachers' terms and conditions of service. However, while these functions may assist in empowering teachers, the White Paper makes no mention of the participation of teachers in curriculum reform and innovation. Since teachers are responsible for implementing the curriculum in the classroom, there is no better way of endorsing the professionalism and respect for teachers than through their participation in curriculum development. Participation is likely to create a feeling of quality ownership. Currently the participation of teachers in curriculum reform and innovation in St Lucia is minimal, although small groups of teachers are usually selected to take part in development and reform.

In St Lucia, like most other small states, curriculum development is centralised. Attempts have been made to involve a minute percentage of the teaching population in curriculum reform; but there is need to involve a larger cross-section of teachers.

Parents, the secondary customers, also have a stake in the curriculum process and they too should be more involved. There is also a dire need to upgrade the skills of employees and bring them up to date with new developments in education. Presently there is no programme in place to ensure that teachers receive periodic in-service training. Therefore, a situation exists where a large percentage of the teachers have had no training within the five years or more. Training and retraining of teachers should form one of the key areas of teacher empowerment.

The Ministry of Education recognises the need to empower schools and employees, and to bring about a cultural shift in its mode of operation. The Education Development Plan (EDP) (Government of St Lucia, 2000, p. 18) defines one of the Ministry's key policy objectives as: '[t]o change the culture of the Ministry of Education from a command centre to a service centre'. This is a powerful statement and it implies that the Ministry recognises that it has functioned in the past as a command centre and is committed to reversing that trend. As we all know, cultural changes do not come about easily and to be effective all stakeholders should be committed to the change process. So far the Ministry has commenced ongoing training for all staff members in customer service and has increased the number of educational districts from six to eight. With fewer schools to manage within each educational district, the Ministry takes the view that Education Officers will play a more significant role in providing guidance and support to schools. Another major strategy is to promote a degree of site-based, fiscal independence. Presently, both schools and Education District Offices rely totally on the central administration for their equipment, materials and supplies.

The Ministry has begun the process of empowering teachers through ongoing professional training and access to information through the provision of internet services in all schools.

At the school level, many principals provide their teachers with opportunities to take up leadership positions, organise and implement activities, be responsible and accountable for specific tasks and participate in decision-making. Such assignments constitute a delegation of authority, a key management function. Some principals in St Lucia, in an attempt to delegate responsibilities, are guilty of devolution. They assign roles, yet do not provide the assistance and support to ensure that the delegated tasks are carried out (see Edward, below).

Quality assurance

The Ministry of Education wishes to improve quality at the primary school level. In the past, little attention was paid to the process. To ensure quality, systematic changes and improvements are required in all the processes involved in providing a quality service to the customers (students). To begin with, the principal has a pivotal role to play in the progress of organisation. The role of the principal is to lead, organise, motivate, develop, recruit, select, appraise and perform various other functions. To perform these duties effectively, the principal needs both management and leadership skills. Before 1999, many primary school principals had not received any formal training. The present Ministry of Education, recognising the need to develop the expertise of principals, organised a one-year in-service training programme in 1999–2000. The small population of principals (a grand national total of 84 at primary level) and the small physical size of the country (just 616 km^2, so there is less distance to travel) have proved to be valuable logistic advantages in organising such customised training programmes.

The professional development of teachers is another case in point. Of 1081 primary school teachers, 30 per cent have received no formal training in teacher education (*Education Statistical Digest*, 2000). In addition, as mentioned in the previous section, no systematic training programme exists for the retraining of employees. Although in the past a number of training workshops were conducted, these workshops were usually organised in a haphazard manner.

Another area where there is room for improvement is the procedure for recruitment and selection of teaching staff. Since teacher characteristics are likely to promote or hinder effectiveness, recruiting and selecting the most capable and committed individuals is essential in improving quality. Presently, teachers are recruited directly from secondary schools with no training in teacher education. Although this aspect requires attention, the limited human resources of St Lucia restricts our options. What could be done in the interim is to develop a training module for these individuals to equip them with skills while they are in service. Another aspect for consideration is the procedure used for recruitment and selection. Most principals have not received training in this function and the tendency is to recommend the most qualified individual based on examination scores and results. This procedure has not always proved fruitful. Making bad choices definitely has a negative impact on the attainment of quality.

Other areas where quality assurance can be implemented in St Lucian primary schools include:

- Organisation of teachers in groups to plan and evaluate lessons, and to identify and solve problems regarding student learning. A number of schools in St Lucia have experimented with such staff groupings;
- Provision of supportive services to teachers, for example in remedial education. With regard to special education, St Lucia is presently experimenting in providing these services at district level by using one specialist to serve a cluster of about 12 schools;
- Involvement of parents in school activities and providing them with opportunities to make decisions and recommend changes. PTA meetings in St Lucia are mainly geared towards informing parents of what is taking place in the school or the future intention of schools. Rarely are parents given an opportunity to influence, and much less to take, decisions that would have an impact on the operations of the school;

- Supervision of instruction and the provision of feedback to teachers. Few principals in St Lucia make it their duty to monitor instruction on a regular basis; when this is done, feedback to the teacher, an important developmental tool, is sometimes neglected.

Quality control

In St Lucia, quality control measures are implemented at four distinct levels: the classroom, the school, the district and the nation. At the classroom level, teachers may test students to determine how much they have achieved on a topic, unit or subject. In some schools, such testing is an ongoing process which is conducted throughout the school year so that weaknesses of students are identified as early as possible and corrective measures are put in place. In other schools, evaluation is implemented more often on a termly basis to coincide with the end of the school term. The results of such tests (both formative and summative) are of little significance unless they are used to establish some semblance of benchmarking, which in turn is intended to improve teaching and learning. Another type of test used by teachers is the diagnostic test to identify specific learning difficulties.

Tests at school level may also be used to determine whether standards set by the school are actually met. As a measure of quality control, this exercise is essential so that schools can evaluate their progress, identify problems and weaknesses, and plan strategies for improvement. At the national level in St Lucia, Minimum Standard Tests have been established at critical points in the education system to provide policy-makers with insights on how primary schools are performing with respect to national standards.

Audit

Both internal and external auditing would be necessary at primary level to evaluate the progress of schools and provide feedback on how well they are doing. External audits are carried out by individuals external to the organisation or school. This audit is intended to help schools identify areas of weakness and thus make necessary changes.

External audit

During the period 1990–1995, the Ministry of Education identified six schools per year for school performance reviews. These reviews were organised along the concept of an external audit and the review team comprised: Chief Education Officer, Education Planning Officer, Registrar of Exams, Co-ordinator for Primary Education, Curriculum Officers, District Education Officer and one principal from another school. The specific areas for assessment were normally kept a secret until the arrival of the team. Some members of the team interviewed the principal while others observed lessons, reviewed lesson plans, examined student exercise books, and scrutinised student and teacher attendance records. The major areas for review included management and leadership, school organisation, school operation, staff morale, teacher involvement, parental involvement and school achievement.

Following the review, the Ministry provided feedback to the school in the form of a written report. The review exercise had strengths but there were also some weaknesses. Its major strength was that it provided an opportunity for an external team to assess the school and provide feedback. One of the major weaknesses of the review was the non-disclosure of the areas to be reviewed. If the performance of individuals or a school is to be evaluated it is important that they are aware of the specific areas being looked at beforehand. An evaluation exercise should not be used as a surprise test but as a means of assisting individuals to achieve specified targets. If no targets are specified beforehand then the exercise may be meaningless. Another weakness of the review was that it involved a high-powered team, members of which did not always have the time to actively participate in the exercise. Consequently, only a few reviews were possible each year, thus extending the timeframe required to review all 105 state schools in St Lucia.

In the St Lucian context, the concept of the school performance review could be continued as one form of conducting an external audit, but some adjustments in the format and composition of the team may be necessary.

First, a pre-conference meeting is mandatory, where the principal and a small team, including the DEO, meet to set performance targets in all the major categories covered in the review. This pre-conference meeting sets the stage for the performance review, which may be conducted between one to three years later. A second recommendation for adjustment is the inclusion in the audit team of teachers, principals and private individuals (either active or retired) who have expertise in the areas to be assessed.

Internal audit

In contrast to external auditing, internal auditing may be carried out by the school's management team. The operational plan of a school should form the basis of an internal audit that may be conducted annually. Every school in St Lucia is required to formulate a five-year strategic plan and to derive an operational plan from the strategic plan on an annual basis. The conduct of an internal audit using the operational plan is likely to inform the school of necessary changes required for the improvement of students and the school.

Conclusion

This chapter has advocated that school effectiveness can be achieved at primary level in St Lucia through TQM if teamwork is made a focal point. Considering the culture and challenges facing St Lucia as a small state, success will depend largely on training for principals and staff, the commitment of management and employees to the drive for quality, and the development of a supportive structure and culture at all levels to promote the attainment of quality. While small scale imposes resource constraints, there are evident logistical advantages, plus the opportunity to witness the rapid effects of policy implementation.

DISCUSSION POINT

- How crucial is the role of teamwork among educational administrators in pushing ahead with a Total Quality Management programme? What measures are required to enlist the strategic support of such diverse groups as parents, civil servants, teachers and heads of schools for the TQM effort?

6

Effective Time Management for Multifunctional Principals in Primary Schools: Insights from the Maldives

Abdulla Ismail

KEY ARGUMENTS

- This study uses a five-day long shadowing exercise to examine empirically how two primary school principals use – or misuse – their time while performing their multifaceted managerial functions. Higher-order management activities tend to lose out and delegation is not practised enough. However, it is not yet scientifically established whether multifunctionality is in itself a cause of stress, or possibly a remedy to stress, acting instead to enhance quality of life.

SMALL STATE CONSIDERATIONS

- Time management is an organisational skill especially important to multifunctional administrators in small states who are obliged to work in a context where there are many demands – some urgent, some important and some trivial – often competing simultaneously for attention.

Time is an asset

Up to a fifth of the Maldives Government total annual recurrent expenditure is allocated to education. Education authorities and school officials are very analytical when it comes to financial resources. Policies and guidelines are developed to monitor and ensure that fiscal assets are not wasted and their use is properly audited. On the other hand, time is rarely a concern for most administrators and no procedures and specifications have been developed by the central administration to ensure that organisations make maximum use of their time. Yet time is a crucial and finite asset; it is as substantial a resource as finance in an education system.

Time management, just like any other form of management, benefits from analysis and planning; the latter's absence or negligence carries serious costs. The absence of time management is characterised by last minute rushes to meet deadlines and meetings which are either double booked or achieve nothing. Such an environment leads to inordinate stress and degradation of performance.

To understand and apply time management principles, one must know how best to use time, as well as how to handle the problems most likely to be encountered in using it wisely. A study exploring the key principles of time management and their implementation should therefore help to improve effectiveness and efficiency in a specific educational system.

Time management is both a personal and contextual process: it must fit both the style of the person and the circumstances of the case. It may require a strong commitment to change old habits; however, such a change becomes more likely when the incumbent is brought face to face with the costly consequences of current behaviour and the potential gains to be reaped from attitudinal reform (Haynes, 1987, p. 2).

The small states context

Time management is vital to every organisation in terms of achieving their organisational objectives effectively. In particular, effective time management is more significant for managers and educational administrators who work in a small state setting. This is primarily so because of the inevitable, multiple facets of their job:

Time is at premium for all administrators in high posts, much more for senior education administrators in small states. Unlike their colleagues in large organisations where roles and duties are well defined and evenly distributed among a number of officials, senior administrators in small states fulfill a multiplicity of roles and are required to cope with a variety of commitments often totally unrelated to each other. (Farrugia and Attard, 1989, p.4)

It is not uncommon for senior education officials in small states to find themselves charged with a long list of very diverse responsibilities. The following list is adapted from Farrugia and Attard (1989):

- Proposing and formulating educational policy;
- Setting specific objectives for the subject or subjects for which they are responsible;
- Planning curricular and up-dating syllabuses;
- Reviewing textbooks and selecting teaching aids;
- Monitoring the teaching of a subject or several subjects at a variety of levels;
- Inspecting and reporting on schools and school personnel;
- Setting and vetting examination papers and monitoring scripts;
- Being responsible for the printing of examination papers and their safe keeping;
- Organising in-service courses;
- Lecturing in pre-service teacher education courses;
- Sitting on interdepartmental committees;
- Trouble-shooting and dealing with complaints by employees, parents and students;
- Issuing circulars and dealing with correspondence;
- Running an office on a day-to-day basis, including staff supervision.

Senior officials who carry out managerial tasks in any organisation in small states are bound to benefit from time management practice in order to better achieve organisational goals and to sustain a healthy and reasonable balance of activities. Allocation of appropriate time to home, family relaxation and recreation should lead to a better quality of life and reduce the likelihood of stress-related illnesses, such as stomach ulcers or heart disease. According to Atkinson (1990, p. 5):

> *Relaxation is an essential component of the managerial day. Constantly working and spending our time doing work which then has little pay-off leads to frustration, anxiety conflict and stress. An effective manager is a healthy manager who develops a sense of balance and uses his* [sic] *time in the best possible way.*

Centrality of time management

The new demands on schools will require better time management in order to achieve educational objectives. The mission of all educational institutes is to improve the quality of the education they provide. If this is true, educational institutions will need to find ways of scheduling school activities appropriately to save more time for future planning. School authorities will require more time to reflect not only upon immediate or existing institutional problems but upon the strategic choices and initiatives necessary to meet the long-term challenges of quality improvement or organisational reform. Time will be needed for teachers, principals and administrators to come on stream as academic standards are overhauled and assessment systems are revised. It will also be needed to make productive and effective use of greater professional autonomy, a hallmark of educational reform in recent years. Adding school reforms to the list of things a school must accomplish, without recognising that time is a limited resource, can easily trivialise the effort required. It sends powerful messages to teachers not to take such a reform exercise seriously and threatens its legitimacy.

Atkinson (1992) points out that time management is central to any management development activity; once managers have learnt to use this resource and achieve their targets, they are likely to develop better ideas of how to manage other resources. Atkinson also argues that, for managers to use time well and wisely, they must be skilled in the following areas:

- delegation of tasks and responsibilities
- assertiveness
- team building
- motivation of self and of others
- setting of objectives
- paperwork and communications management
- procrastination (deciding when to avoid, and when not to avoid, taking a decision)
- stress management
- meeting management
- career planning.

Obstacles

Ineffective time management in a school or other educational organisation can arise from two sources. The first is the resort to ineffective personal time-management practices, such as disorganisation, inability to say no, procrastination or unnecessary perfectionism. The second is the effect of environmental factors which influence managerial behaviour, such as the demands of visitors, telephone calls or being obliged to attend unproductive meetings. A set of 15 time-wasters has been identified as follows (Engstrom and MacKenzie, 1987):

- Telephone interruptions
- Visitors dropping in without appointments
- Meetings, both scheduled and unscheduled
- Crisis situations for which no plans were possible
- Lack of objectives, priorities and deadlines
- A cluttered desk and personal disorganisation
- Involvement in routine and detail that should be delegated to others
- Attempting too much at once and underestimating the time it takes
- Failure to set up clear lines of responsibility and authority
- Inadequate or delayed information from others

- Indecision and procrastination
- Unclear or absent communication and instruction
- Inability to say no
- Lack of targets which prevents proper tracking of developments
- Physical and mental fatigue.

Observational study

With these ideas and concerns in mind, the stage was set to undertake a structured observational study of two principals in Male' primary schools.

The aim of this study was, through descriptive analysis, to set up a short but detailed history of the work of two primary school principals and to examine how these principals used their time to perform their multifaceted managerial functions. A shadowing exercise was planned for the duration of a whole working week.

For such an observation to take place, a core list of anticipated activities by school principals was first drawn up by the researcher. This was done after executing a pilot survey, which involved the meticulous recording of the various daily activities of a number of different principals in a time log. The consent of such principals to participate in such a study was secured in advance and their anonymity guaranteed. The list of 34 observed activities which was thus compiled was intended to serve two main purposes: firstly, it would serve as the template on which to record the nature and duration of the two school principals who were to be closely shadowed; secondly, it would form the basis of an eventual structured questionnaire which would be presented to the principal at the conclusion of the observation week. The principals would then be challenged to comment on the actual manner in which they had spent their working time, in contrast to the balance and mix they would have preferred to follow. Evaluating the current use of time is useful in that it enables the subject to visualise how well time is spent on each activity. This can also help to relate the use of time to the prioritisation of tasks as assigned by the actor.

The 34 core activities identified from the pilot study are listed below. It was assumed that these 34 activities would comprise all the possible behaviour by the principal that would be observed. The activities reflect a wide range of responsibilities, varying from task to person orientation, from the execution of clerical to leadership roles, from the accomplishment of immediate to long-term goals:

1. Signing/purchasing/procuring
2. Attending external meetings
3. Perusing budget estimates
4. Ordering stock
5. Attending meetings in school
6. Filing/sorting/organising desk materials
7. Talking to staff/delegating tasks
8. Touring premises
9. First aid
10. Making policy decisions
11. Checking new equipment
12. Talking to schools office and other schools
13. Running meetings
14. Writing letters/notes/forms
15. Organising meetings
16. Cleaning rooms; shutting windows, locking up
17. Running assemblies
18. Talking to students
19. Answering phone calls
20. Reading journals/memos
21. Supervising staff
22. Talking to parents
23. Compiling records
24. Monitoring expenditure
25. Designing and evaluating curriculum
26. Handling money
27. Talking to staff, general advice
28. Teaching
29. Attending in-service training
30. Exercising discipline
31. Talking to secretaries
32. Building/maintenance
33. Talking to Ministry of Education
34. Having meetings with PTA

Observation and data collection

Data collection was based on the concept of structured observation where the observer shadows a subject. For this study, two primary school principals in Male' state schools were observed over a one-week period. Activities undertaken by each principal were shadowed in the time log by a school supervisor from the time of arrival at work until departure from school in the evening. The time log was prepared with a column for extra comments, where an observer records in any work completed by the principals at home after working hours. The two principals selected for observation for the purposes of this study were one man and one woman.

Results of observation

The time spent on each of the 34 items per principal varies between 0 to 480 minutes (eight hours). These 34 items were classified into three subgroups, depending on the amount of time dedicated to their achievement in the week of observation, as follows:

First group of activities (taking up less than one hour each during the week under observation):

> Curriculum activities, supervision of staff, planning and decision making, tracking building and maintenance issues, talking to secretaries, handling money, compiling records, signing purchasing orders, reading bulletins, talking to parents, ordering stock, delegating, first aid.

Second group of activities (taking up more than one hour each but less than three and a half hours each during the week under observation):

> Talking to children, answering phone calls, attending external meetings, running meetings, attending school functions, curriculum design and evaluation, attending in-service course, meeting with parents.

Third group of activities (taking up more than three and a half hours each but less than eight hours each during the week under observation):

> Attending school meetings, budget estimation, filing and sorting out letters, signing report cards, writing letters/notes/forms/newsletters, running assemblies, monitoring expenditure, other general school business.

Furthermore, the fieldwork highlighted the following results:

- Principals work around 60 hours a week, with very limited time for relaxation and family life.
- Twelve per cent of the principals' time is spent on administrative issues such filing, organising, signing reports and seeing to paper work; whereas only 4.8 per cent was spent on curriculum issues and student related activities.

- Hardly any time was spent on supervision of staff, on delegating work to other staff members or on reading for self-development.
- There was no indication of any time being spent on communicating with the secretary in terms of discussing organisational issues; whereas 5.6 per cent of the total time in one week was spent answering telephone calls.
- No time was spent on student discipline, teaching and communicating with other schools.
- No major differences were reported between the male and the female principal observed.

Discussion

The two principals observed clearly work long hours and are under constant stress. They are involved in a large variety of activities and are unable to devote much time on curriculum development and supervision of staff. Effective time management practices may help to increase the time spent by such principals on academic activities which are extremely important for the effective running of a school.

Developing personal, effective time management practices, as well as planning and setting goals for the organisation may help school principals to save time for academic activities. Such practices can include:

- Setting up a **daily work schedule** and time-table. If unexpected demands arise outside the order of these priorities, they could be flexibly shifted accordingly to meet new demands.
- **Managing telephone calls** by directing some to other members of staff (such as a personal secretary) and keeping the ones that the principal needs to handle personally brief and to the point.
- Adopting an **'Open-door' policy** certainly suggests accessibility and a welcoming orientation; but there will be time when closing a door for a period of undisturbed concentration will be both necessary and more effective. Open-door opportunities could be grouped on specific days and times, and aligned with an advertised policy for school staff, students and/or parents to meet the principal. In any case, meetings should be focused and time limits should be specified.

- **Attending and running meetings** were recorded as the second most time consuming activities for principals. But are all meetings really important and/or necessary? What is their purpose? Who needs to attend? And will they start and finish on time? It is a good idea to declare not just the start time but also the end time of any meeting, thus obliging the participants to work hard on completing the agenda.
- **Procrastinating** leads to failures in accomplishing tasks and meeting deadlines. It may be important to 'sleep over' a problem; some problems do get somehow sorted out by themselves. But the majority call for decisive action. Appreciate that tasks need not be undertaken in a perfect manner; while others are best broken down as a series of smaller, less daunting, challenges.
- Learning to master **the skill of refusal.** The two observed principals of male primary schools are between them engaged in no less than 42 different activities organised by their school, the Ministry of Education or other, external, organisations. At some point, principals have to find polite ways of saying no and rejecting new responsibilities which may be put forward by various ministries and non-governmental organisations. Cutting down on, or reducing, what are seen to be less important and expendable activities would enable more time to be spent on more important work such as staff development, supervision and curriculum development, as mentioned earlier ... or simple relaxation!
- **Dealing with paperwork** – now increasingly being complemented by electronic mail – is the most time-consuming activity recorded during the one-week observation of the principals. A personal filing system could save time in responding quickly to communicated requests. In any case, it is important to decide what to do with each shred of paper or electronic mail message which enters one's system. Whether one decides to forward, file, copy, revise, reply or discard, the key is to take action right away and handle each paper/message only once.
- **Planning and setting goals** for schools helps teachers and staff to visualise future destinations and consequently the decisions that the

school must take in order to reach declared goals. Clear job specifications and policies enable staff to move decisively and act quickly within a system of delegation (Bolman and Deal, 1997).

- It was observed that school principals perform a number of administrative and non-administrative duties that could easily be handled by their subordinates. **Delegating** is one solution towards reducing the pressure to respond to so many professional tasks, while carving out some space for higher-order management activities and personal development at work or private pursuits beyond. Effective delegation is not a disowning of responsibility; subordinates must be accorded sufficient authority, training and support to carry out tasks safely and competently.
- **Handling organisational review and audit** completes the management functions expected from the school environment. Such an activity, undertaken with the help of both internal and external actors, also helps to identify the opportunities and threats facing the school and the nature and state of its key strengths and weaknesses.

Revisiting the problem

Primary school principals in the Maldives are generally aware of, and competent in carrying out, the above measures. This obliges a re-visiting of the hypothesis and of the reasons why school principals find themselves in a management situation which appears, certainly to external critical assessors, to be unsustainable, badly organised and conducive to damaging stress levels. Rather than adopting a 'deficit' perspective, which finds the school principals lacking in the organisational skills required for effective time management, this state of affairs may be explained by a different hypothesis. This alternative hypothesis is also supported by the comments made by the two school principals after they have been confronted by the observational evidence at hand.

It appears that multifunctionality offers a number of hardly recognised benefits to those who practise it. Having a varied repertoire of duties and responsibilities can, in itself, help to diversify one's behaviour and to reduce stress levels, rather than increase them. High levels of engagement in meetings and other social activities at the school premises and beyond helps to develop human relationships as well as permitting stronger social positioning, which can prove very useful in effective decision-making in a small state. It appears that, rather than the inability to say no, small state administrators may deliberately seek to 'colonise' a broad swathe of tasks and functions, which spill over and impinge explicitly on their personal and family life, since such tactics may be seen to enhance their political role as well as their general access to (public and private) information. Does such behaviour enhance the quality of life, differently defined, in a small state?

These general observations require further corroborative research; but they certainly point in a direction which substantiates the premise that there is a small state 'ecology' which needs to be analysed on its own merits (Commonwealth Secretariat, 1986, p. 5). Furthermore, these concluding comments invite us to soberly consider the issue of effective time management not just from the point of view of what appear to be organisational requirements but also from the vantage point of the actors concerned and their own agendas.

DISCUSSION POINT

- Do educational administrators in small states actually enjoy operating with considerable pressure on their working time? Are there informational, political and social benefits in having 'too many fingers in too many pies'? Is imperfect time management a small price to pay in exchange for towering stature in a small-scale society, and the related possibility of 'building monuments' for oneself in the community?

7 Selecting Public Secondary School Teachers in Cyprus

Klelia Sourmeli-Skotinou

SMALL STATE CONSIDERATIONS

- In a small state it is easy to upset the balance between supply and demand. This is because all markets, including those for specific human resources, suffer from a relatively greater elasticity and volatility.
- Personnel selection procedures in small states command a great deal of attention as well as possible suspicions of foul play.
- A widespread 'cargo cult' orientation generates a propensity amongst small state citizens for greater trust in ideas, projects and products that originate overseas; this is conducive to a steady stream of imported and alien pedagogical contents and techniques.
- Many small states have started off with educational systems that reward liberal education rather than a vocational one. The acknowledgement of vocationalism is now overdue.

The controversy

One long-standing, controversial issue in the educational system of Cyprus concerns the procedures for recruiting and selecting secondary school teachers. This situation has major implications on the effectiveness and the quality of education and is the focus of this article.

The current system of teachers' appointment to public secondary schools is based on the drawing up of lists of candidates for appointment according to a priority ranking. This is primarily determined by the date of submission of the candidate's application. Such a procedure for appointment, coupled with a surplus of university graduates who are interested in becoming teachers, has led to a situation where the appointees' lists have become long waiting lists. Interested candidates have to wait for many years until their turn arrives. The Ministry of Education has identified some fundamental negative implications of this procedure on the educational system, and has tried to propose alternative procedures for selecting teachers for state schools. However, this issue has spilled beyond the purely educational and has become an overtly socio-political one.

The *educational* implications of the current procedure are quite grave. Clearly, the present system is crying out loud for reform in order to offer a better quality of education. Having the right educational personnel with the right skills and disposition is crucial for an effective learning environment. An appropriate recruitment and selection strategy is necessary in order to ensure that the candidates chosen are indeed the most suitable; that they are effectively prepared and equipped – in knowledge, skills and attitudes – for the task at hand; that their effectiveness is maintained, encouraged and reinforced throughout their career; and that their morale is raised and the motivation for continuous professional development is inculcated and sustained. A list-based recruitment procedure effectively works against all four of the above objectives.

Secondly, the issue is also *social*. Prospective candidates for teaching jobs accept the current system as 'fair' in the sense that the criteria for appointment are objective and as a result there is no intervention. Hence any improvement should take this into consideration. On the other hand, waiting for many years to enter a job clearly erodes the personality of candidates with several possible implications for the social life of a person, marking time for many years with hardly any incentive for social development.

Thirdly, the problem is also *political*. This connects with the ethos of the political class. Privately, politicians may admit that the present situation has catastrophic implications for the quality of education. However, when it comes to taking a stand and deciding on improvements, the political intricacies become overwhelming. Policy standpoints will be assessed in relation to presumed political costs and to the possibility of causing 'social injustice' to some of the candidates expecting appointment. In small state contexts, political decisions are invariably weighed against their impact on particular individuals; policy changes with widespread consequences may be kept on the metaphorical backburner for quite some time.

Various interested parties have reacted to efforts to change the present regulations governing the selection of teaching staff. Their main concerns seem to centre around the notion that any alternative system of teacher selection, which includes other criteria than those already laid down by law, would increase the likelihood of discriminatory intervention and favouritism. At the same time, there is a widespread feeling that in attempting to find a solution to the present shortcomings of the teacher recruitment process, consideration should also be given to the interests of all the various pressure groups involved: students and parents, candidates for teaching posts, existing teachers, the political parties, not to mention the interests of the educational system and the state.

Claims of the potential for nepotism and favouritism are particularly salient in small states. In a small country it is quite usual to expect to know somebody who can influence appointments or any other similar procedures in the public domain. In addition, in a small state the political parties are more easily subjected to person-specific pressure and, therefore, if somebody has power or access to someone with power, crucial selection decisions may be influenced.

One can also argue that in a small state it is much easier to upset the balance between supply and demand in human resources. The issue of the lists of candidates is basically the result of the fact that the available supply of candidates for teaching jobs exceeds the demand of the system for such personnel. A surplus of human resources cannot easily be absorbed in Cyprus with its population of around 650,000; this has resulted in a build-up of the oversupply of potential teachers in a very short time. This situation may have been exacerbated by an earlier government decision to improve the teachers' conditions of service and to make the job more attractive through various incentive schemes. The problem in certain subject areas, such as science, is compounded by the fact that in Cyprus there are no large industries through which some of the candidates can be absorbed in alternative occupations.

Implications of the selection process

The impact of the negative implications of the current system of teacher selection is acute, as anyone involved in the educational system is well aware. This paper is the outcome of an in-depth investigation of the current system of teacher appointments to public secondary schools in Cyprus. In the process, an attempt is made to analyse data from the lists of appointees (regarding numbers and distributions of ages) and information from the distribution of active teaching personnel at secondary level. In addition, the positions, opinions and proposals of various parties – presented in reports, announcements, minutes of meetings, newspapers and discussions on television, as well as by personal discussions and interviews – are considered critically. I will also draw upon my own 'insider knowledge' of Cyprus and its educational system, particularly by virtue of my position and experience as an assistant headmistress who has worked with many appointees who had been waiting for many years before their first appointment.

The major parameters of the recruitment process will be reviewed first, with particular reference to small states. In doing so, suggestions will be tabled with respect to improvements in teacher recruitment and selection procedures in Cyprus, and especially the 1994 proposals by the Cyprus Government. In this connection, one is reminded of the statement by Farrugia and Attard (1989, p. 59):

The selection and the appointment to government posts in small states generate a great deal of attention as well as possible suspicions of foul play. Senior education administrators would do well to avoid all possibilities of entering into the social and bureaucratic quagmire which would reflect negatively on the efficiency of the organisation and their own professional credibility.

These potential dangers are considered below with respect to the criteria for teacher selection. In order to identify the relevant elements of such a condition, an appraisal is undertaken of three key dimensions that characterise the suitability of a person as a teacher, namely qualifications, personality and commitment.

The qualifications dimension

Hoyle (1969, p. 55) asserts that:

Qualifications are particularly important. Whether a teacher is a graduate or not is an important determinant of how s/he is viewed by his/her colleagues, and, to a lesser extent, by his/her older pupils.

In the context of Cyprus, the question of being a graduate, along the lines of Hoyle's assertion, does not really arise, as there are already thousands of wait-listed graduates. What seems to be the issue here is whether or not these graduates are appropriately qualified for a career in teaching. This uncertainty is strengthened by the results of a recent stress-related survey (referred to by Englezakis in this book) amongst the secondary school headmasters in Cyprus. These indicate that the third most important source of stress amongst 28 stress indicators was related to the shortage of well-qualified teachers. Hence it is of fundamental importance to analyse further the dimension of qualifications.

Qualifications, and therefore the level of teacher education, vary from country to country. Requirements are also related to the level at which the candidates will be teaching, the actual possibilities for local pedagogical training and the needs of the educational system in question. Neave (1992, p. 39), in his comparative study of member states of the European Union, highlights a pattern behind the variety of teacher qualifications:

> *Teacher education at the secondary level is set off by three particular features: first, it is discipline based and specialist; second, teacher induction is based on a 'consecutive' type: that is, teacher training follows the study of an academic discipline at university or a similar institution. There is also a third characteristic ... the difference in the type of qualifications and training required to teach in lower-secondary schools in contrast to those demanded for teaching in upper secondary education.*

In the case of Cyprus, the two first criteria apply, since secondary school teachers are qualified as subject teachers. In fact, in order to be eligible for appointment as a teacher in state secondary schools in Cyprus, a university degree in one of the subject areas in the secondary school curriculum is a minimum qualification. An additional prerequisite is that the candidate must have completed a state secondary school programme or a recognised private one of an equivalent level. In the case of a candidate who has completed his/her secondary education in a school where Greek was not the medium of instruction, the candidate is obliged to sit an examination confirming competence in the Greek language.

I am aware that the great majority of the listed candidates are subject specialists. In that context, studies leading to their degrees primarily centre on the context dimension of their subject specialisation and limited emphasis tends to have been placed on the pedagogical dimension. In some specialisations, there appears to be a total lack of attention to pedagogical issues. Under these circumstances, the majority of the appointees are essentially subject knowledge specialists but pedagogically underqualified. Thus, while a first degree may be an acceptable indicator of subject matter knowledge and competence it is a poor indicator of mastery and competence in the art and science of education.

There is, therefore, an urgent need to ensure that teachers in Cyprus are competent in relevant aspects of pedagogy. A post-graduate qualification may be indicative of a candidate's capacity and aptitude for high-level work, including research; but there is a danger, as Hoyle stresses (1969, p. 50), that '... the subject-centred specialist may become too academic and remote from his/her pupils...'. This is especially true if he/she has to deal with young pupils in the lower secondary school. Thus, candidates on the waiting list who have undergone further studies in pedagogy may be assigned bonus points, since this additional qualification can be taken to reflect both an indication of interest and of improved abilities in the practice of teaching.

The personality dimension

It is not easy to define 'personality'. This is clear from the attempt by Graham and Bennett (1992, p. 55):

> *Personality may be defined as the total of the various qualities that are shown in behaviour. Although this definition, taken literally, includes intelligence and physique, the term personality is usually taken to include above all emotions, motivation, interest and social qualities.*

In this section, I try to analyse this definition with reference to teachers and, secondly, to establish the characteristics that may be prevalent features of a teacher's personality. These characteristics, I believe, are shaped by the various and multifunctional roles that a teacher has to play, especially in the small state context.

Under normal circumstances, a teacher has to fulfil at least three major social functions with regard to his/her interaction with students. These are instruction, socialisation and evaluation. A teacher also needs to motivate students, maintain overall responsibility and control of the situation, and generally create a classroom environment conducive to learning, while respecting ethical and moral standards. The distinctly *professional* approach to the occupation, and the adoption of a sense of purpose, are crucial parameters, as emphasised, amongst others, by McClelland and Varma (1989, p. 61).

The situation in Cyprus militates against the cultivation of such desirable attributes. The average age for teacher recruitment is the rather advanced 36 years old. It is also generally accepted that physical and psychological stamina tend to decrease with age. Indeed, what stands out after long years in the queue is the feeling of frustration, of job insecurity and of the lack of experience in a school environment.

The commitment dimension

Knowledge is not enough to guarantee teachers' effective performance. Motivation is also crucial. Roueche and Backer (1986, p. 89) analyse motivation to imply commitment, goal orientation, integrated perception and reward orientation.

Commitment, according to the same authors, implies '… showing a deep dedication to one's chosen career and valuing the teaching/learning process as a valid way to achieve society goals'.

In focusing more specifically on the teacher-student relationship, Roueche and Baker (1986, p. 90) define commitment as: '… a belief that students can reach their potential and that a teacher's primary purpose lies in making significant contributions to others'.

In this context, effective teachers are expected to be dedicated to their work and to their students and to believe that all students can learn and that they, as teachers, can have an effect on the students' ability to learn. Having a positive outlook on teaching and learning will help students establish and reach demanding, yet realistic, goals. In doing so they are likely to promote their students' growth and maturation, both personally and academically. Such a commitment generally also extends beyond the four walls of the school; it embraces relations with other teachers, parents and members of the broader community. It also supports the teacher's own continuous professional development.

Commitment to the professional ethos also involves teachers' zeal towards their professional development. An effective teacher should consider him/herself as a lifelong learner seeking new knowledge with zest and enthusiasm and refreshing what has already been acquired. This commitment to professional development is manifested, for example, by a teacher's interest in participating in conferences and workshops, by being active members of professional associations and by reviewing professional literature.

While candidates remain wait-listed in Cyprus, they typically have another job. Unless they happen to be teaching in a private institution, an altogether different mentality and attitude towards teaching commitment may develop; their personality is directed towards traits that are not necessarily characteristic of a competent educator and may be more dominated by commercial and financial parameters. Consequently, once they have been appointed, it may be difficult for teachers to develop a sense of commitment to their new profession, particularly if the various motivating factors are at a low level. This situation is in sharp contrast to that of a young person fresh out of university entering the teaching profession for the first time with aspirations, hopes and serious long-term prospects.

In the context of a small state, the need for stronger commitment from the teacher for the qualitative development of education is perhaps more fundamental than in larger ones.

Firstly, there is an urgent need for overcoming the paucity of resources. As Farrugia (1991, p. 585) notes: '... a great deal of time, energy and occasionally goodwill are sacrificed because of the scarcity of personnel, finance, materials, space and time...'. In the case of Cyprus, this shortage obliges teachers to prepare teaching material during their nominally free time.

Secondly, there is a need to overcome a dependency syndrome which devalues educational projects that may be initiated locally. This widespread 'cargo cult' orientation generates a propensity amongst small state citizens for greater trust in ideas, projects and products that originate overseas (Worsley, 1968). In education, this tendency leads to the neglect of indigenous expertise, local instructional programmes and resources in preference for imported and alien pedagogical contents and its methods (Farrugia, 1991, p. 590).

Thirdly, the strong influence that politics plays in small territories may often lead to divided loyalties amongst teachers and therefore affect their level of commitment to the goals and ideals of education (Richards, 1982). Support for candidates to trade union bodies is easily divided into factions that correspond to political parties. Such developments weaken the practice of healthy industrial relations and bring the professionalism and status of teachers into question.

Fourthly, because of the central role afforded to education in the development efforts of small states, there is a tendency for teachers to believe that their position is secure so that they feel little need to develop any strong commitment to the teaching profession. This situation is, in a number of situations, reinforced by the nature of the promotion procedures within the education system. For example, in Cyprus seniority is a predominant criterion even in the promotion process, and thus the commitment element in teaching is undervalued.

Finally, efforts to generate supplementary income can have negative effects on teacher commitment. There are clear instances where teaching seems to have been relegated to a second priority, while teachers pursue other economic activities, such as involvement in private tuition. The multi-functionality attributed to executives in small states can lead to divided loyalties and the erosion of commitment and professional integrity.

To summarise, teacher selection criteria should not only be based on qualifications and performance during academic studies; they should also include an appreciation and assessment of personality characteristics that are positively correlated with the functions and role of the teacher, the extent of commitment to teaching, the profession, students, parents, society and overall educational policy, as well as some understanding of, and willingness to engage with, what is actually happening in the classroom and the school context.

Under the current system of selection of secondary school teachers in Cyprus, there is no provision for taking into account any of these widely accepted selection criteria. The only minor exception is the requirement for all candidates to have a university degree or equivalent. Some attempt was made in the Cyprus Government proposal of 1994 to introduce clear procedures for identifying the extent of the candidates' competence; however, hardly any effort was made to assess the commitment of candidates.

Conclusions

Teaching is generally characterised by relatively attractive conditions of work, long holidays and short working hours. It is also particularly suitable for parents who wish to raise a family while following a promising career. It is also generally held in high social esteem. These variables combine to make teaching an attractive choice of employment, while its strategic and pivotal importance to all states means that teachers are members of the largest profession.

Suitable selection criteria are undoubtedly critical for sound educational planning and management. The issues discussed in this chapter may appear quite peculiar to Cyprus. There are, however, a number of general observations which have a wider applicability, certainly to educational planners and practitioners in other small states.

There have been quite erratic changes in Cyprus in the numbers of candidates that are willing to enter the teaching job at the secondary level. While at the beginning of the 1970s there was a fair balance between supply and demand, in a few years' time an influx of university graduates interested in taking on a teaching post exceeded all expectations. No doubt, the 1974 military intervention of Turkey contributed to encourage Cypriots to look for employment which promised strong job security. Such changes are indicative of 'hypothermia' – the abrupt and quick manner in which a small country can witness changes in the condition of any of its local markets (Baldacchino, 2000).

A similar point is made by Farrugia (1992, p. 587) with respect to changes resulting from demographic movements on small islands – not just changes in births, life expectancy and deaths, which tend to be long-term, but in inward or outward migration, which can be very sudden. These lurches can play a vital role in educational planning:

> *A slight change in the demography of small states has immediate effects on their education provisions. ... The changing demands make educational planning extremely difficult, because the actual numbers are small but the impact significant.*

These remarks suggest that the educational planner would do well to consider the more delicate equilibrium between market forces in a small state in order to shape the right policies for teacher selection while promoting the full and best use of available human resources. Adherence to a long waiting list is not a suitable strategy in this regard and it is certainly not the best one. The quality of Cypriot state secondary education is at stake. Market signals, as well as a well-equipped guidance and counselling service, should help to channel eventual entrants into the labour market to follow qualification paths which are more likely to translate into gainful employment and which are not necessarily focused on teaching.

Furthermore, many small states have embarked on the development of their educational systems with a legacy that rewards a liberal education rather than a vocational one. It is, therefore, not surprising to find a number of countries, like Cyprus, where graduates are expected to make excellent teachers, not only after many years of 'marking time', but without any specific instruction in the skills of pedagogy *per se*. Vocationalism is now making important overdue inroads in many educational systems, not least those of small countries. It may be opportune to start acknowledging the relevance of a distinctly pedagogical formation among those who wish to be eventually recruited to a teaching post in a secondary school.

Of course, in considering alternative systems of teacher selection, no effort should be spared to ensure that the possibility of discriminatory intervention by interested individuals or groups is eliminated. Admittedly, the number of potential appointees on the waiting lists is quite large (some 10,000 candidates in a country with a population of about 650,000) and therefore their political clout as a group is considerable. They constitute a pressure group that politicians cannot ignore.

The spectre of graduate unemployment and underemployment should also be taken into account. In any circumstances it is crucial that the present situation does not persist. It could be argued that the state has no obligation to find or offer employment to all graduates – but political pressure is likely to suggest some interventionist strategies. One must recognise that the potential candidates for a teaching post, often obliged to wait for many years for their appointment, are not to be blamed for the structural problems in the Cypriot educational system. This case study offers interesting insights not only on educational planning, but also on the delicate inter-relationship between planning *per se* and market forces, especially in the more volatile and elastic small state context.

DISCUSSION POINT

- **The elasticity of a small state can lead to very abrupt changes in the supply or demand of a product or service. Can you suggest examples of how a desperate shortage/demand can very soon give way to a glut/supply?**

8

A Principal Education Officer as a Multifunctional Administrator and Manager in Botswana

Melton Basinah Bangale

KEY ARGUMENTS

- Principal Education Officers II (Primary) in Botswana provide a useful case study of multi-functionary practice. Such officials are expected to behave as leaders, supervisors, liaison officers, facilitators, managers, administrators and trainers.

SMALL STATE CONSIDERATIONS

- Being called a multifunctional administrator can be a camouflage for saying 'A Jack/Jill of all Trades: Master/Mistress of None'. But personal knowledge and networking suggest that it is possible to be efficient and effective in one's work, in a way that is different from what
  may be expected from a standard, large-scale perspective.
- Because of personalisation, it appears that, in practice, the best form of control is when the task is not dependent on the role, but on the person occupying the role.

Introduction

Botswana was one of the poorest countries in the world at independence in 1966. The country has since transformed itself into a successful economy in Southern Africa and it is one of the few African states classified by the World Bank as having a middle-income economy. Its economic growth has of late consistently exceeded population growth, resulting in a higher standard of living. It should be noted, however, that the 1990s have been characterised by chronic economic recession.

Like other small states, Botswana is compelled to extend its minimum resources and low per capita costs by having its officials and facilities act in a multi-purpose way. This obligation is often seen as a handicap. Khan (1991) cites this condition as one of a long list of disadvantages to which small states are exposed. These include over-extended personnel, small spare/reserve capacity, few specialists, a relatively inadequate level of compensation, and inappropriate and infrequent training. It is also reflected in small establishments, limited promotion and mobility, limited alternative employment, low morale and motivation, low adaptability to changing conditions, shortage of management skills and a low problem-solving capacity. Khan also notes a high level of fear and frustration, absenteeism, timid decision-making, continued systematic uncertainty, low level of innovativeness and entrepreneurship, and excessive routine dependence.

The Caribbean Centre for Development Administration (CARICAD) also argues that there is a scarcity of manpower and technical personnel in small state governments to perform new, complex functions associated with national development because of the small size of the population and the difficulties of recruiting and maintaining qualified personnel in view of the scarce financial resources of the public sector and the consequent low levels of salaries. Other limitations are seen in the difficulty of educating officials to perform tasks requiring scientific and technical knowledge in the light of a relative lack of opportunities for higher or specialised education, and the problem of retraining/retaining them when they have been educated or trained externally.

This negative analysis is common, both in the general literature as well as amongst policy-makers or consultations based or trained in larger organisations, departments or ministries abroad. Multifunctionality comes across as simply an euphemism, a brave way of trying to justify what may be, in reality, a fairly hopeless situation.

Warrington (1994) proposes further that micro-states are not only small, beautiful and vulnerable but complex in their own distinct ways. Such complexities, and the overall effects of smallness of scale on government, are multifaceted and contingent. Multifunctionality among small state actors must therefore be seen in relation to roles, bureaucracies and organisational politics which are just as intricate, demanding and perhaps intractable as would obtain in much larger countries. On the other hand, Farrugia and Attard (1989) are more optimistic and argue that smallness of scale and multifunctionalism have a positive dynamism of their own, when officials rise to the occasion and solve what appear to be intractable problems.

This chapter will seek to review the debate on the pros and cons of multifunctionality with specific reference to a practical situation of which I have extensive knowledge and experience. This is the role of the Education Officer (Primary Education) in Botswana.

Primary school management and administration

The Department of Primary Education is the central controlling agency for primary education in Botswana. Before the creation of this department, the most intractable problems lay in the area of communication between the ministry headquarters where decisions on policy are made, and the individual schools where they are meant to be implemented. The flow tended to be one-way, from the ministry to schools, in the form of circulars and directives which typically took too long to reach their intended destinations without any possibility of feedback or discussion. As an improvement, most of the policy references, administrative procedures and guidelines have been devolved to the periphery, mainly to enable headteachers, Principal Education Officers II and Principal Education Officers II (Regional) to take decisions and undertake appropriate action without having to consult or depend on headquarters.

A Principal Education Officer II (Primary Education) in Botswana is a public service employee within the managerial grades. Such an officer is a member of the Primary Education Department, which is headed by the director. The department, in turn, forms part of the Ministry of Education.

I would like to highlight some important developments here. The Ministry of Education has recently undergone major reforms which have led to major changes in organisational structures and job specifications. The overall purpose of the comprehensive Organisation and Methods (O and M) review was launched by the Directorate of Public Service Management to improve the overall performance and effectiveness of the public service. The review covered all ministries and departments at all levels of their operations. The exercise was undertaken in two stages. The first stage involved a review of ministerial organisation set-ups (objectives, functions and structures) while the second stage addressed itself to the study and improvement of work systems and methods at all levels of the public service. This review was expected to result in, among other things, a stable, adequate and effective public service which would serve the government of the day, and which would have impeccable ethical standards, high integrity, strong morale and the competence to effectively discharge its responsibilities at all levels of its operations.

The reform also sought to strengthen the institutional capacity of the public sector to implement development policy and meet national objectives by improving some organisational arrangements, accountability and operational work procedures. The advent of O and M has led to the creation of more divisions and, more relevant to this study, to the upgrading of the existing posts of Education Officers and Senior Education Officers to Principal Education Officers II (Inspectors).

Inspector of Schools v. Education Officer – today

The issue of supervision of schools by inspectors has been up for discussion for several years. This has been a topic of discussion in both micro and macro states. The idea of supervision is broad and is subject to different meanings and interpretations, depending on one's past experiences, interests and needs. In Botswana, the position of the Principal Education Officer II is crucial, as will be discussed in more detail in this chapter.

Botswana became a British protectorate in 1885 but the development of education was neglected by the colonisers since, among other reasons, it was anticipated that the protectorate would eventually become part of South Africa. There were very few schools in 1885; they were established by the London Missionary Society and by Roman Catholic missions, in particular, together with some tribal chiefs in isolated tribal territories. However, the Western type of inspectorate permeated into the protectorate around 50 years ago. It was not uncommon to equate an inspector of the past decades to a policeman of teachers. Indeed, he (no women inspectors had then been appointed) behaved more or less like a policeman of that time. He did not inform teachers in advance that he was visiting their school and when he did come he tended to look for mistakes and weaknesses, instead of providing the services and support teachers needed. He was often seen as a threat to the security of teachers since he was notorious for his critical tendencies and lack of support.

In this vein, supervision was confined exclusively to inspection and summative evaluation. The mission of the inspector in schools was to direct and pass judgments. There was hardly any co-operation, no sharing of experiences, no provision of valuable information to reinforce the teacher's effort and very little sign of appreciation.

The visit of an inspector to a school resulted in a report to more senior authorities. This, in turn, could lead to demotion, dismissal or confirmation, or loss of gratuity or pension. It was not associated with staff development or instructional improvement. It hardly ever led to a promotion. It created a strained relationship between the supervisor and the supervisee and consequently to very poor educational results.

Supervision has changed and continues to change as a concept. In Botswana, it is now seen as a part of the entire evaluation and professional development system. New ideas and methods of teaching are emerging to meet the children's learning needs; hence supervisory activities are now geared much more towards the enhancement of teaching and learning. The

Botswana Education Officer – who is no longer called 'Inspector' – has moved away from the old traditional policing role to a facilitator who visits schools mainly to advise and teachers. Supervision is now seen as a process that leads to the improvement of teaching and learning by studying and analysing the teaching–learning situation, and then to co-operation with the teachers to develop a programme to improve the situation.

Supervision of instruction and educational administration

Supervision has moved away from being seen as a practice of testing, judging, observing, interviewing, giving orders and compiling a report which can be detrimental in results and morale. Today, there is a range of ideas concerning the role and purpose of supervision. These can be divided into three categories:

- **The monitoring, inspecting and accountability model.** This strand does not abandon the traditional practices of supervision. However, it emphasises evaluation, testing, discrepancy analysis and feedback as elements of practice and controlling for either conformity or change.
- **The human relations and morale-building model.** This emphasises the informal relations among people, sensitivity needs, promotion, personal development, removal of constraints and maximisation of freedom of action. Before a supervisor can observe a teacher at work, there should be a relationship of mutual trust and respect. Both the supervisor and the teacher must view each other in a positive way. They should consider themselves together as pursuing the same purpose of promoting the quality of learning. The two should consider themselves to be colleagues who contribute equally towards the achievement of the goal without one imposing authority on and dominating the other. The supervisor ought to recognise and respect the teacher's contribution by listening, caring and supporting.
- **The change–process oriented model.** This emphasises planning, designing, guiding, stimulating, goal setting and even manipulation of environmental factors to promote improved instructional practices.

All these perspectives are geared towards ensuring quality education. The responsibility of quality assurance rests with the teachers; the Principal Education Officer II has a duty to check and assist in the case of shortcomings. The Principal Education Officer II audits the process of quality control implementation, giving an appropriate diagnosis and showing the way to correct its shortcomings. Performance of this function is done in a collegial manner since the Senior Education Officer's role has changed.

Following this role transformation, the Principal Education Officer II's role would, in an ideal situation, include the following:

- Concern for both means and ends. Teachers at times perform badly due to lack of material or financial resources or to lack of training opportunities; at times such deficiencies are a result of a lack of support and assistance from supervisors;
- Awareness of potential unintended consequences as opposed to the anticipated results only;
- Concern for the development of a climate receptive to change through open communication, trust and dealing with conflicts constructively;
- Stronger emphasis on planned change and schools renewal, devoting more attention to the enhancement and improvement of problem-solving processes;
- Attention to the management of time as a scarce and irreplaceable resource;
- Recognition of the need to maintain an appropriate amount of stress at work and cope more effectively by learning how to control mental and physiological responses to stress;
- Sensitivity to the interaction of schools with external environmental factors that include economic, social, technological and political forces, the result of which affects the school culture;
- A duty to link the activities of particular schools to the policies of the ministry and the overall objectives of government as well.

Management

Rosenzweig and Kast (1973) remind us that managing is like standing up on a barrel and rolling it forward with your feet; it is therefore difficult to just stay on top without worrying about the direction the barrel is moving.

Maintaining a dynamic equilibrium in the management of schools can be a complex process. For example, a 1983 newspaper article in a local paper argued:

> *We are turning out young men and women who are superbly trained but poorly educated ... They know everything that is to be known about functional requirements of their trade but very little about the human situation that serves as the context for their work.*

A Principal Education Officer II has to realise and understand this shortcoming and should apply proper management skills to deal with the proper balance of education and training, of teaching and learning skills, in any educational environment.

Management is work; but it is not the individual performance of some work. Its success and performance are to be identified in the success and performance of others. It is about working for, with and through people, and is a vital force that links all other subsystems. Principal Education Officers II are also managers. They are encouraged to see themselves as such. Management involves a variety of specific responsibilities, which are listed below:

- The co-ordination of human, material and financial resources so that organisational goals can be achieved effectively and efficiently;
- The improved responsiveness of the organisation to its external environment and societal needs;
- The development of an organisational climate where people can accomplish their individual and collective goals;
- The performance of certain definable functions such as goal setting, planning, monitoring assembling resources, organising, implementing, evaluating and controlling;

- The execution of various interpersonal, informational and decision-taking roles.

Principal Education Officers II are expected to apply the above general principles of 'good management practice' habitually in their work. Those working in small states, moreover, typically have to take more of these principles into account, in difficult combinations, involving them in the following tasks:

- Budgeting, recruitment, training, examinations, supply of materials, school-mapping, transfers of teachers, for which they need literature on educational planning which is not always avail able;
- Being concerned with quantity and quality of education and its relevance to all citizens, even though the medium of instruction may disadvantage some ethnic groups at lower primary school level;
- Spending frequent periods 'out of the office' and travelling long distances, with payment of a minimal subsistence allowance for nights out, since schools in Botswana, more especially in rural areas, are far apart;
- Being empowered by law to conduct investigations on a primary school teacher. This leaves little room for him/her not to be called a police officer or someone who uses the iron fist in a velvet glove;
- Enjoying the support of ancillary staff who cannot, however, be asked to perform professional duties in school. In the absence of the Principal Education Officer II, therefore, some important tasks may fall behind schedule.

A question which arises immediately at this point is whether there is any difference between management and administration. Administration has to do with the orderly application of routine procedures within the existing legislation and policies: management concerns a strategic and visionary approach to actions and the planning of requisite resource allocation. A Principal Education Officer II (Primary), in the context of Botswana, performs both management and administrative tasks. His/her role also involves planning, organising, controlling, supervising and evaluating.

Such Principal Education Officers II are important links in the chain of communication within the Department of Primary Education. They represent the management at systems level in dealing with teachers and local authorities and represent their subordinates when dealing with the top management (Farrugia and Attard, 1989). It is obvious that this type of job means living with stress. Principal Education Officers II are often referred to as the people in the middle. As such, they must put up with the complaints and work problems of subordinates and must also meet the expectations of senior management.

The Principal Education Officer II, therefore, is one of the most important positions in Botswana's Primary Education for two reasons. Firstly, teachers deal with management mostly through their Senior Education Officers; secondly, upper management deals with the teachers, primarily through its Principal Education Officers II. Because of the dual nature of the position, the Senior Education Officer may have to act as a member of the management group and at another time as a leader or spokesperson for the teachers. The Senior Education Officer may have to represent unpopular teachers' views in management meetings or pass on unpleasant management directives to teachers.

The possibility of an ambiguous role identity is fairly large, requiring both skill and tact. All management is potentially subject to these contesting loyalties, but lower-line management most of all.

How the work is done

The job of a Principal Education Officer II (Primary) in Botswana is certainly a difficult one. It is made even more peculiar by the multifunctional manner in which it is actually performed.

A manager's work is typically fragmented: specific encounters are brief; little time can be dedicated to any single activity; interruptions, discontinuity and brusque decision making are typical (Morgan McCall *et al.*, 1978, pp. 6–18). When the role definition is wide, the range of duties and responsibilities increases and all will impose themselves on the manager's 24 hours per day. The tensions which go naturally with the job are enhanced by the expectations of subordinates and superiors as well as the physical obligations of travel within the country. Lack of specialisation also means that resources – funds, ancillary staff, transport, communications equipment – must typically be shared and therefore internal power schemes to establish some prioritisation are to be expected. Being a manager and an administrator, being an authority figure and a voice for the less powerful, is not enough. The officer must be prepared to engage in organisational politics in order to attempt to do one's job properly – there is no guarantee of success, let alone of continuous success.

This discussion brings us face to face to an alternative set of resources that a senior administrator-cum-manager like a Principal Education Officer II in a small state bureaucracy is likely to develop and deploy in his/her career. These include the availability of good personal contacts and ease of access to alternative and efficient information channels; the ability to dedicate short but intense energy to specific issues, usually by responding directly to key individuals or players involved; the development of a network of strategically located loyal supporters and informants who can make up for one's physical absence; and the cultivation of trust and collegial relationships with superiors, whose work s/he may have to 'stand in' to perform when the former are absent. The sum assessment of these tactics amounts to the personalisation of the job at hand. It appears that the best form of control is when the task is not dependent on the role, but on the person occupying the role.

Really, this is not so much a question of strategic choice but a fact of life in small state environments. There are 35 Principal Education Officers II and 10 Principal Education Officers I in the whole of Botswana. The number of staff teaching in primary schools is just under 12,959 – suggesting a ratio of 370 teachers per 'manager'. This situation easily supports the development of personal links between manager and managed. Each Principal Education Officer II would know, and would make it his/her business to know, every teacher in the inspection area. Some are relatives, others attended school together or they have just become friends and professional colleagues. This can be a very good thing – it can provide the ideal lubricant to facilitate the operation of professional machinery.

References in the literature have certainly tended to emphasise the downside to this condition:

a) administrators may find it hard to discipline or sack ineffective workers;

b) senior government officers may be exposed to greater pressure to give rewards even when they are not merited;

c) senior government officers may be under duress to cut corners in the name of expediency, rather than stick to established but dragging procedures;

d) administrators may be more tempted to provide employment for relations and friends, rather than following proper channels for recruitment (see, for example, Bray, 1987; Farrugia and Attard, 1989).

I would consider this assessment to be certainly partial and too negative. It may be difficult to convince non-small state readers about this; but it is still possible to reach a high degree of efficiency and effectiveness in such situations. The criteria for such success may, however, need to change and be adapted to specificities.

Conclusion

In Botswana, as in many other small countries, a person is often expected to perform more than one role and a wide range of tasks in any single job. This is more common in positions of leadership. Principal Education Officers II (Primary) in Botswana perform multifunctional duties and activities. The following are the main roles:

- general school administration and management;
- instructional supervision and training of primary educators;
- school-community relationship;
- communication between schools and the Department of Primary Education/Ministry of Education.

These ambitious functions have also to be seen in the context of a recently independent state seeking to quickly transform its educational legacy into a modern system directed to the specific development needs of its economy and society, and including universal literacy (Bennell and Oxenham, 1983, pp. 18–19). Perhaps the challenge also includes the definition of what senior officials are expected to do; until now, the exercise of multifunctionality is still in the main considered to be an excuse for shoddy dilettantism, or crisis management. I would, on the basis of a cool and dispassionate analysis of practice, beg to differ. Multifunctionalism can be, and in Botswana has shown itself to be, a specialism and skill in itself.

DISCUSSION POINT

- How can multifunctional administrators become or remain specialists?

9

Towards a Performance Appraisal Scheme for Teachers and Headteachers in the Maldives

Ahmed Ali Didi

KEY ARGUMENTS

- Appraising teaching staff is a vital management function. But this function must be, and must be seen to be, fair, factual and consistent.
- Performance appraisal intended for career development is distinct from assessment intended to gauge competence for possible promotion.

SMALL STATE CONSIDERATIONS

- Performance appraisals which call for compromising judgments and painful confrontations are notoriously difficult in small states where the appraiser and the appraisee are likely to know each other and to meet over and over again in many other official, as well as social, settings.
- Geographical dispersal and paucity of available resources further condition the effective implementation of a performance appraisal scheme in a small archipelago state like the Maldives.

The Setting

Before 1994, the only form of performance appraisal that existed for teachers in the Maldives was a terse comment made about the employees in the departmental annual report. This was typically a collective statement, with individual comments reserved only for the most outstanding performers. The remaining majority was ubiquitously graded as average (Bray, 1991b, p. 81). Such uncompromising judgments are easy to make and avoid painful confrontations, especially in small states where the appraiser and the appraisee are likely to meet over and over again in many other official, as well as social, settings (Bray and Packer, 1993, p. 89). In extreme but not exceptional cases, employees are related by blood or marriage to other employees. In summary, as is reported in the context of another small island state '... the pressure to grade most people as average reduces the value of the whole appraisal' (Bakeea, 1991). Meanwhile, those designated as 'outstanding performers' will, more often than not, find out that these accolades serve them in good stead when it comes to their prospects for career advancement.

In such a scenario, introducing a valid staff appraisal programme geared towards professional development is absolutely necessary. Staff development activities have long been recognised as requiring more attention (Waheed Hassan, 1991, p. 102). However, any such initiative is to be understood as radically distinct from a scheme intended to facilitate decisions concerning increments and promotion prospects; such a scheme simply cannot support individuals in their professional development.

One adverse effect of not having a proper staff appraisal scheme is that many incompetent teachers survive within the system. Many now hold senior positions, blocking the career paths of younger, perhaps more enthusiastic and more capable, teachers. This situation creates unnecessary problems for the Ministry of Education. These range from issues pertaining to classroom management (such as ineffective class control); administration (such as mishandling of funds); political acumen (such as clashes with the island chiefs); or serious moral or ethical concerns (such as sending pupils home early and exhibiting favouritism towards members of staff or students).

Furthermore, Trethowan (1992, p. 263) contends that people '... will perform better if they have a means of measuring their own progress'. The existence of a yardstick against which to compare output and performance is, in itself, a strong spur to excellence and model behaviour. It is also a suitable form of self-regulation which is to be expected from any serious profession.

This chapter will assess the manner in which small scale and its implications impact on the setting up and implementation of a performance appraisal scheme for teachers, using the Maldives experience to flesh out the argument.

There are many aspects of the small scale factor which can contribute to the socio-economic development of a country and, particularly, to the development of a programme such as an appraisal scheme in a school system. For the purpose of this study, three aspects of the small scale condition are considered as being the most relevant:

1. Interpersonal relationships

According to Benedict (1961) there exists, in small states, a high degree of particularistic culture, as opposed to universalistic culture, which exerts great pressure upon the exercise of official roles, sometimes to the extent of undermining their correct operation. The particularistic ideology '... refers to the relationship of persons to each other in all their particularity or uniqueness. Kinship relations, especially close kinship relations, are of this type' (Benedict, 1961, p. 48). The relationship between two individuals in a particularistic culture is affectively charged and extends over a considerable time span. Furthermore, *who* a person *is* matters more than *what* a person *does*. In a universalistic culture, in contrast, the relationship of individuals is based more or less on fixed standards and criteria. The incumbent of such a role treats all others with whom s/he comes into contact in this role relationship in terms of universal categories (ibid., p. 48). The universalistic relationship is also be affectively neutral, has a very limited time span, although it may occur at repeated intervals and is predicated solidly on legal-rationality and official roles (ibid., p. 49).

In closely-knit societies, therefore, '[it is] extremely difficult to avoid bias and not to be influenced by personal considerations and community prejudices' (Farrugia and Attard, 1989, p. 80). This condition renders the personal appraisal function a most challenging and delicate task (Bray, 1991b). Sometimes, disagreements on one issue can often and easily extend not only to related matters but also to totally unrelated issues (Farrugia and Attard, 1989, pp. 26–27).

It seems that subjectivity and personal considerations can never be totally excluded from interpersonal behaviour, especially in small states. Furthermore, the decision making process is itself not anonymous and hardly immune from public scrutiny. The challenge is not just to remain impartial and objective, 'to be fair, factual, consistent' (Farrugia and Attard, 1989, p. 84). Were this so, opting for factual and accurate information, and presenting observations from different angles with the aid of well-established, known and declared criteria would go a long way towards overcoming the problems of undertaking a performance appraisal of personnel in small states. But decision-makers are known; they are easily identified and just as easy approached and contacted. The transparency of the decision-making process and the thinly stretched human resource chain means that many individuals, including those affected by decisions, know – with astonishing accuracy – who is ultimately or solely responsible for taking specific decisions. This increases the likelihood of lobbying and other appeals for particularism.

2. Geographical dispersion

In addition to being small, the islands of the archipelagic Republic of Maldives are scattered over a wide geographical area and most of them lie far from the capital, Male', where the Ministry of Education operates. Of 1190 coral islands, only 200 are inhabited and only 25 have more than 1000 people. Dispersal and low numbers bring about a differentiated provision of services: consider the following extract from a report prepared by a consultant and her local counterpart, regarding a proposal for in-service training in one particular atoll which has 16 islands and 16 schools, one on each small island:

> *Thirteen schools are experiencing difficulty accommodating the number of students on roll and the majority are operating with less staff than they require, particularly for Grades 6 and 7. It appears ... that only four may be offering adequate time to cover curriculum requirements for the older students. In several of the smaller schools, English has only begun to be taught during the last academic year and in one school no English is taught at present'.* (Knight and Qasim, 1996, p. 1)

A basic competency survey has suggested that '90 per cent of atoll students were over-aged for their grade' (Ministry of Education, 1995, p. 92) while Baumgart (1994, p. 31) states that the issue of student wastage and drop-out is a widely recognised problem.

The far-flung nature of the island archipelago presents the added burden of travelling from one island to another, consuming time and money which a small state can ill afford (Farrugia and Attard, 1989, p. 42). Hence it is difficult, even impossible, to introduce an ongoing appraisal scheme if appraisers have to come from other islands, especially from Male', where qualified personnel can be found more easily.

Furthermore, the knowledge level of current teachers does not easily qualify them to serve as appraisers, at least not before they go through an appraisal cycle twice. The only alternative, therefore, is for headteachers to serve as the appraisers, even though some of the atoll schools have as many as 40 to 50 teachers each. This could mean that it would take a good number of years before every teacher goes through a single appraisal cycle. Still, half a loaf is better than none and it would be useful to start anyway and steadily build up a more solid and sound foundation for teacher professional development.

3. Paucity of resources

The most obvious limitation of being small is the paucity of resources, both human and financial. In human resource terms, the pool from which qualified personnel can be drawn is tighter in a small state. In financial terms, a narrow economic base makes it extremely difficult to secure funds for education which already consumes a hefty 14 per cent of the national budget (Ministry of Planning, Human Resources and Environment, 1996). Foreign aid is also much less forthcoming than in previous decades, when:

> *generous assistance* [was] .. *received from a number of friendly countries under bilateral arrangements ... and organisations such as the Colombo Plan and the various United Nations agencies ... provided educational aid in the form of scholarships, grants and educational materials.* (Ministry of Education, 1981, p. 2)

In the late 1970s and 1980s, when nation-wide public education was still in its infancy, funds were diverted to more pressing, quantifiable aspects of education such as the construction of new schools, training of teachers and production of new curricular material. Thanks to these initiatives, the almost complete universalisation of primary education from Year One through Year Five was soon achieved, a considerable achievement and probably more easily done, and in less time, in a small state like the Maldives. But more emphasis now needs to be placed on quality. Even if only on a trial basis, the Ministry of Education needs to launch a performance appraisal scheme, envisaged as part of a support mechanism to bolster the professional development model of teachers, especially in the outlying atoll schools.

Being practical and realistic, this is also likely to mean that, even within the selected schools, only a few teachers will be chosen to participate in the programme. They could possibly be selected on a voluntary basis or according to some other criteria agreed upon by the staff involved. Such an implementation strategy would be possible given the paucity of resources, but should also serve as a positive demonstration, mitigating the concerns and fears of those teachers who may be suspicious of or hostile to such an initiative and its purported objectives.

Implementing the scheme

A performance appraisal programme in the Maldives would be best undertaken as a joint effort by three parties: the Supervision and Co-

Curricular Activities Section of the Ministry of Education which deals with quality issues; the Atoll Schools Administration Section (also within the Ministry); and the Institute of Teacher Education. Ownership by both administrative and educational institutions should guarantee that the exercise is properly conducted and is seen to be a serious and legitimate policy initiative. Proper conduct should also incorporate sensitivity to the challenges of operating in a small state environment.

The actual implementation of the scheme can be broken down into a number of stages. They will involve a series of introductory discussions with senior officials of the three parties who are expected to own the programme; senior officials who have experience as headteachers earlier in their career may be trained to eventually start serving as appraisers for existing headteachers. Awareness raising and training for appraisal can be incorporated into the regular meetings that heads of schools have with ministry administrators. A number of headteachers will be selected to serve as appraisers for the rest of the teaching staff in such meetings, preferably on a volunteer basis. After having undergone training in appraisal, headteachers will be asked to repeat the training programme with the teachers in their respective schools. In addition, headteachers who are taking part in the pilot scheme will start preparing for their initial appraisal meeting. Senior officials detailed to appraise will have to plan a series of trips to the chosen schools within a period of two years in order to conduct initial meetings with the staff, collect relevant data and eventually conduct the appraisal interview as well as conducting the review (follow-up) meeting.

It is intended to have two appraisers in the case of the appraisal of headteachers. In general, one of the appraisers should have experience of headship while the other should be an officer from the Central Office of the Ministry. Both appraisers need to become familiar with the context of the school by referring to the relevant policies and guidelines. Furthermore, appraisers will need to maintain credibility with those bring appraised and with the wider educational community; ensure consistency in their approach and sense of judgment; be competent to offer advice and support; and be in a position to ensure that appropriate follow-up takes place

(Bollington *et al.*, 1990, p. 76). Headteacher appraisal must be undertaken by 'supportive professionals and peers who understand the pressures of the job' on a day-to-day basis (Horne and Pierce, 1996, p. 143).

Performance appraisal intended for career development is distinct from assessment intended to gauge competence for possible promotion. Without this clear distinction, the performance appraisal exercise will be under huge pressure to conceal any deficiencies or areas for improvement and instead give a perfect score and top marks to the appraised. The status and wide respect enjoyed by teachers, and especially by headteachers, in many countries would be sorely tested if such role models are examined and found wanting, and their less-than-perfect scores publicised amongst the community where they are known, which could easily happen in a small society. This is all the more likely to happen if the appraiser is comes from outside the community (or worse, is 'imposed' from the 'centre'), and is seen to have passed judgment on a headteacher based on a separate atoll.

Meanwhile, if the performance appraisal function is truly a developmental (and not a judgmental) initiative, it must be clearly linked to developmental possibilities. Thus, following an appraisal, a teacher may be identified as lacking training in information technology or language competence; such a teacher should be earmarked to receive in-service training – in the case of the Maldives, by the Institute for Teacher Education – in order to make up for the diagnosed deficiency.

Conclusions

Although starting relatively late, the education system of the Republic of Maldives has almost achieved a world standard target: universal primary education up till Year Five. However, there remains much to be done with regard to quality. Since quality of education is very much dependent on the quality of teachers, the scanty attention paid by the authorities to maintain or monitor the quality of teachers has not been conducive to the most effective provision of education, especially to those children who attend the atoll schools away from Male'.

Regrettably, the performance appraisal scheme of sorts introduced in 1994 has been related to material rewards: what is needed is a scheme which is also geared towards professional development. If run properly, and linked to training and development opportunities, such a scheme will help to boost the enthusiasm of many teachers. It provides a welcome avenue, so far unavailable, for individual teachers to set their own targets and, with the help of a colleague, to identify whether or not these have been achieved.

Any such satisfaction, however, depends on the assumption that the appraisal process is seen to be fair and non-threatening. The relationship between appraiser and appraised that is created at the initial meeting must be properly nurtured through the review meeting and beyond; the head of the school must be committed to nurture the positive climate that is arguably created at the very first discussion, while the ministry should ensure its full support to the school and the appraised in order to rectify any reasonable shortcomings.

It may be wise to allow appraiser and appraised some room to influence the eventual choice and to self-select each other. However, the scheme must be run professionally and should be seen to be so; some acknowledgement of the hierarchy of command should be factored in when determining who should be appraised by whom. Furthermore, the coupling of two persons as appraiser and appraised who are known to be 'buddies' would easily undermine the whole exercise and expose it as a farce – nothing but a cheap camouflage for what is intended to be a rigorous and critical process. Ultimately, personal relationships must be recognised as crucial for success and will make or break any performance appraisal scheme operating in a small scale environment.

DISCUSSION POINT

- **How do you make suitable allowances for personal relationships in a performance appraisal scheme which is meant to be fair, objective, scientific and impersonal? Is this a contradiction in terms?**

10 Occupational Stress, Job Satisfaction and Coping Actions among Cyprus Headteachers

Demetrios Englezakis

KEY ARGUMENTS

- The stress problem among headteachers in state schools in Cyprus is widespread and calls for corrective measures.
- Three out of the four identified sources of stress that concern headteachers in Cyprus relate to the management of interpersonal relations with academic subordinates.

SMALL STATE CONSIDERATIONS

- The Cyprus educational system finds itself hard put to (1) dismiss teachers who have proved to be unsuitable for the teaching profession or (2) impose disciplinary procedures or (3) recruit the most suitable teachers. Some of these debilitating features may have to do with the working environment of small states, where familiarity, obligations, political affiliation, family networks and personal knowledge can make it more difficult to impose penalties.

- **Sources of occupational stress can include knowing, or knowing about, applicants and selectors in selection procedures which elsewhere would be run in a more impersonal and objective manner.**

Enter stress

Flach (1989) reminds us that stress has varying meanings among professionals and even wider differences in interpretation among the general public. Stress can be both something damaging that has to be minimised or avoided, or else a refreshing spur to problem solving and achievement. Indeed, the same stressor can serve both these opposite effects for different people, or even on the same person at different times. Selye (1974), a pioneer on this issue, has argued that stress can be the 'spice of life'. Stress cannot be completely avoided, but we can learn a great deal about how to keep its debilitating side-effects to a minimum.

Stress that is related to work environment has been termed *occupational* or *job stress*. Beehr (1991) defines job stress as a situation in which job-related factors interact with a worker's personality to change his or her psychological or physiological condition.

Teacher stress is a specific type of occupational stress. Using a model of stress similar to that of Lazarus (1999), one may define teacher stress as:

> *a response of negative affect, such as anger or depression, accompanied by potentially harmful physiological changes, resulting from aspects of the teacher's job and mediated by the perception that job demands are a threat to his or her self-esteem or well-being, and by coping mechanisms that are activated to reduce the perceived threat.*

This is the definition of stress adopted for the purposes of the study which forms the empirical basis of this chapter.

Headteacher stress is a specific kind of teacher stress, since headteachers and teachers share the same school environment and many aspects of school life are common to them; however, teachers do not typically have responsibility for the variety of administrative, curricular, resource-related, interpersonal and logistic decisions which are handled by a head of school. The burden becomes even heavier with higher levels of decentralisation.

People may resort to a variety of behaviour patterns to obtain temporary relief from stress. These are called *coping actions* and most of them fall within a normal range of behaviour. Lazarus (1999) argues that coping is what a person does in order to handle stressful demands. He distinguishes between two kinds of coping processes: *direct actions*, through which one tries to deal with the source of stress, and *palliative actions*, through which one tries to soften or moderate the experience of stress, without tackling the source(s) of stress. For example, a headteacher who is stressed by the frequent interruptions caused by incessant telephone calls may install an answering machine in order to reduce stress levels – this is a direct coping action. On the other hand, if the headteacher tries to cope with the stressful situation by trying to forget all about it and engage in sports activities or by consuming alcohol, then this would be a resort to palliative action.

Objectives of this study

This study seeks to investigate the sources and prevalence of occupational stress, job satisfaction and coping actions among Cyprus headteachers in state schools. Additionally, it will assess the impact of specific demographic variables, such as gender, type of school and length of service as headteacher.

Some peculiarities of the system

There is a definite distinction between primary and secondary education in Cyprus. Until recently primary teachers have been trained at the Pedagogical Institute (a higher education institution which provides a three-year course); while the great majority of secondary teachers are university degree holders trained overseas (the exceptions being some instructors in the vocational schools). The University of Cyprus was established only recently, in 1992.

No transfers of teachers or headteachers are possible between primary and secondary schools. Primary teachers and headteachers had, until 1996, lower salaries and teach for more hours a week than their secondary school counterparts. Headteachers in all types of schools in Cyprus also have teaching duties.

Academic promotions in the Cyprus Education System are mainly based on seniority, so the majority of the headteachers are not far from the age of 60, which is the retiring age.

Of the 361 primary headteachers in Cyprus, 202 were asked to participate in this study. Headteachers whose schools have less than 150 students were omitted; of these, 60 schools have less than 30 students. This represents more than 56 per cent of the population of promoted headteachers and is considered representative for the purposes of this study.

Of the 103 secondary school headteachers in Cyprus, 87 were asked to participate in this survey. Those omitted were headteachers of the Evening Gymnasia (evening schools offering remedial secondary education to adults), headteachers of the state schools for further education (evening schools offering special courses to students and adults) and headteachers of three very small gymnasia with less than 50 students. Of the 87 secondary school teachers in the study, 56 are gymnasium headteachers, 20 work in lycea and 11 in vocational schools. The sample of 87 secondary school headteachers represents almost 85 per cent of secondary school headteachers and is also considered representative for the purpose of this study.

Altogether, 289 headteachers were therefore invited in April 1995 to participate in the survey by completing an anonymous, self-administered questionnaire, adapted from Borg and Riding (1993), Borg and Falzon (1993) and Kyriacou (2000). Two hundred and forty-one usable questionnaires were returned to the author. This represents an encouraging response rate of some 83.4 per cent, which is well above the 70 per cent considered to be the minimum acceptable response rate when surveying a professional population, as suggested by Wiersma (1986).

Main findings

Self-reported stress and job satisfaction

The overall results of this study indicate that over 40 per cent of the Cyprus Headteachers consider their job as a headteacher to be either very stressful or extremely stressful. The level of the self-reported headteachers' stress is not related to gender, type of school or length of service in the post of headteacher.

Only 7.4 per cent of Cyprus headteachers are either not at all satisfied or not much satisfied with their job. The more experienced headteachers reported greater job satisfaction. There is also a significant negative correlation between overall self-reported stress and reported job satisfaction.

Sources of stress

The sample of Cyprus headteachers indicated the following top four sources of stress: (1) reprimanding staff; (2) managing a teacher's absence; (3) coping with a shortage of well-qualified teachers; and (4) taking on too much responsibility. Ranked lowest among potential sources of stress in a list of stress factors were attending meetings with staff and the presence of inspectors in the school. The order of ranking was generally consistent across the various demographic subgroups.

Significant group differences in sources of stress

Table 10.1 shows the stress items whose stress mean scores differ significantly, and the subgroups between which this difference exists.

Table 10.1. Perceived Sources of Stress: Summary of Significant Findings

Sources of Stress	More stressful to:	Than to:
Frequent interruptions of your work	Primary heads	Gymnasium heads Lyceum/Technical heads
School major inspections	Primary heads	Lyceum/Technical heads
Trying to resolve conflicts/ disagreements among teachers or ancillary staff	Primary heads	Lyceum/Technical heads
Challenges to your authority	Primary heads	Lyceum/Technical heads
Inadequate training in school	Primary heads	Lyceum/Technical heads
Management issues	Less experienced heads	More experienced heads
Inspectors' presence in the school	Primary heads	Gymnasium heads
Inadequate salary	Male heads	Female heads
	Primary heads	Gymnasium heads
Maintaining school discipline	Lyceum/Techical heads	Primary heads
Students' achievement	Less experienced heads	More experienced heads

Coping actions

The four most popular coping actions indicated by Cyprus headteachers were: (1) trying to find more about the situation; (2) developing realistic expectations; (3) seeking to avoid confrontations; and (4) trying to relax after work. The least preferred coping actions were: (1) trying to forget work when the day is over; and (2) taking it out on other people when the headteacher felt angry or in a bad mood. The ranking of the coping actions was generally consistent across the demographic subgroups.

Significant group differences in coping actions

- Female headteachers resort more often than male headteachers to the coping action of talking about problems with someone else after work.
- Female headteachers resort more often than male headteachers to the coping action of trying to find more about the situation.
- Lyceum and technical school headteachers resort more often than primary headteachers to the coping action of trying to forget work when the school day is over.
- Lyceum and technical school headteachers resort more often than their primary colleagues to the coping action of asking for advice and suggestions from someone at work .

Discussion

The questionnaire

There are limitations in the use of questionnaires in such studies, because respondents self report the level of their occupational stress as it is perceived by them at that point in time. In the present study, some respondents may have associated the study with the solution of some specific occupational issues that bother them, and it is likely that they may have over-reported their stress level.

One of the respondents in the present study commented:

> ... *I hope that it* [this survey] *will lead to the enactment of detailed regulations about the functioning of Primary Schools and about the Scheme of Services of teachers of all levels. ...*

Another respondent wrote:

> ... *there is another kind of occupational stress, and this is the one you have when you travel to distant, outlying areas. We have to travel every day for long distances to go to school.* (Travelling to a rural school or to another town is part of the duty of various teachers.)

Such specific issues, which may not have been foreseen in the drafting of the questionnaire, are indicative of a prioritisation which headteachers are likely to have about their own specific predicament; some of these issues were not included in the questionnaire but would still influence the overall perceived definition of the situation.

Overall stress and job satisfaction

The high response rate of 83.4 per cent is indicative of how concerned Cyprus headteachers are about the issue of stress. The study reveals an unexpectedly high proportion of the headteachers self-reporting a considerable amount of stress: 40 per cent of respondents indicated their stress level as relatively high. This result, while in line with those of similar studies (Knutton and Mycroft, 1986; Savery and Detiuk, 1980; Wilson and Otto, 1988; Borg and Riding, 1993) indicates a higher percentage of highly stressed headteachers.

The self-reported stress of the Cyprus headteachers is likely to reflect both the responsibilities of their job, and the expectations and demands associated with it. No causal relation of the stress level with gender, type of school and length of service as headteacher was found. This is again in line with the studies mentioned above in this chapter, except to some extent with Borg and Riding (1993) where stress was found to be related to length of service in the post.

The high levels of job satisfaction recorded are in line with the results of other studies. The higher level of job satisfaction indicated by the more experienced headteachers could be explained by the fact that these headteachers, being close to retirement, successfully end their career at the very top of the school hierarchy. A definite time horizon at the end of their career also contributes to minimising the effects of stress since the latter is seen as temporary and, therefore, much more manageable. The majority of such headteachers do not possess qualifications which would make them eligible for the very few higher posts in the ministry, so promotion is ruled out and cannot be a reason for their dissatisfaction.

The correlation coefficient between job satisfaction and self-reported stress was negative and significant, which is consistent with the results of other studies, such as those by Knutton and Mycroft (1986) and Borg and Riding (1993). This means that those who were least satisfied with their job tended to be the most highly stressed.

Top stress items

Three out of the four identified sources of stress that concern Cyprus headteachers relate to the management of interpersonal relations with academic subordinates. The action which causes most stress is that of reprimanding staff. Reprimanding is never pleasant. The reason why Cyprus headteachers rank this item top mainly reflects their concern to maintain a co-operative working environment and good relations with their teaching staff. Teachers are educated people and do not like to be reprimanded, especially if they do not share the headteacher's point of view. The other top stressors concern coping with the absence of teachers or with the shortage of well-qualified teachers.

The existence of these three top stress items may well be a consequence of some other weaknesses of the Cyprus educational system, for example the difficulty of dismissing teachers who have proved to be unsuitable for the teaching profession, or of imposing disciplinary procedures and recruiting the most suitable teachers. Some of these debilitating features may have to do with the working environment of small states. As Farrugia and Attard (1989) point out:

> *The social milieu tends to complicate the process of recruiting or promoting staff. Personal relationships, political influence and family ties can exert*

> *overbearing pressures to the extent that senior* [education] *officials in small states envy the impersonality and anonymity of their colleagues in larger countries.*

If the social milieu in a small country exerts overbearing pressures on senior education officials in resorting to actions concerning discipline, recruitment or promotion, is the education official powerless to intervene in relation to an incapable or insubordinate teacher? Perhaps not. In Cyprus, only extremely unsuitable teachers are dismissed. The majority of unsuitable teachers are more likely to continue teaching until they reach retirement.

Although recruitment and dismissal of teachers is not the responsibility of a headteacher in Cyprus, it is the headteacher who has to cope with any unsuitable teachers who happen to be on his/her staff. It would probably be very stressful for a head to continuously reprimand such a teacher.

One of the male respondents indicated the importance of recruitment in his comment. He argued:

> *In order to achieve their goals, headteachers should have the possibility to recruit their personnel. They should have further studies in Educational Administration and be able to draw upon sufficient funds.*

Absenteeism is a real problem for Cyprus schools; it is not surprising that headteachers mention it as the second highest source of occupational stress. There are generally no supply teachers to replace absent teachers. In primary schools, children whose teacher is absent are distributed among other classes. In secondary schools, every teacher has an obligation to cover for an absent colleague for seven periods per school year, over and above his or her teaching duties. Practically every teacher serves his/her quota by approximately the end of January. Hence, no replacements for an absent teacher take place after that. An absent teacher causes a wide range of disruptions, including a breakdown in school discipline, safe supervision and covering the curriculum, leading to an increase in complaints from parents.

The high job security of the Cyprus teachers as state employees, the relative ease with which they can obtain paid sick-leave, the undeclared involvement of state employees in second jobs, the obligation of male teachers to do military service in the National Guard, along with the difficulties resulting from the smallness of the social system where people are known ... all these may be factors that contribute to absenteeism in state schools. Some years ago, an ex-inspector of Mathematics used the press to openly accuse secondary teachers of abusing sick-leave.

The shortage of well-qualified teachers could also result from a system of recruitment which is based on a long list of waiting applicants, particularly in the secondary school sector. Graduates may be appointed as teachers in state secondary schools many years after their graduation. In the meantime, they may take up other jobs not related to teaching and may have grown detached from the substance and method of their discipline. Their motivation and inclination to teach is also likely to suffer in the process (Sourmeli-Skotinou, above).

Another stress item indicated by headteachers is that of assessing and reporting on teachers' performance. The ranking of this item as the fifth highest cause of stress can be explained by the responsibility felt by Cyprus headteachers for both the quality of the teaching service and the future career of teachers in their school. Headteachers' reports play an important role in teachers' final assessment and consequently for their promotion prospects. Such promotions provide the educational system with school administrators. Those chosen should be the best qualified in order to maintain high standards. However, Farrugia and Attard (1989) again warn how the ease of knowing, or knowing about, applicants and selectors can put pressure on a procedure which elsewhere is run in an impersonal and objective manner. Headteachers in a small country such as Cyprus need to be aware of these pressures and learn to cope with them. Managing the 'ecology' of smallness can lead, in itself, to occupational stress.

Group differences related to stress items

The statistically significant findings of this study generally reflect the structure and characteristics of the Cyprus educational system, the beliefs and values of Cypriot society and the Cypriot way of life. Of the 12 significant findings concerning sources of stress across the subgroups of all demographic variables, eight refer to items that are more stressful to primary headteachers. This reflects how primary teachers and headteachers are generally less qualified, have enjoyed lower salaries and are obliged to teach for more teaching periods per week than their secondary school counterparts.

A declared *inadequate salary* is more stressful for male than for female headteachers. In Cypriot society, men continue to be, by and large, the sole breadwinners of the family unit. The higher the man's salary, the more he is considered successful in his family role. A married woman's work continues to be seen as a supplement to her husband's income. Although these beliefs are slowly changing, the Cypriot family is a long way from balancing the roles of men and women. It is not, therefore, surprising for male headteachers to consider inadequate salary as more stressful. Similar findings were reported by Borg and Falzon (1993) and Borg *et al.* (1991).

The issue of an inadequate salary is one which stresses primary headteachers more than their gymnasium colleagues. This is to be expected, since primary headteachers have received lower salaries until recently, while not necessarily having an easier job.

Experiencing frequent interruptions to one's work is more stressful for primary than gymnasium, lyceum or technical state school headteachers. As has already been mentioned, primary school headteachers have more teaching periods than their secondary school colleagues. Primary schools have no secretarial staff (except in some rare instances of large schools where the parents' association may employ such staff) while there are secretaries in all gymnasia, lycea and technical schools. So it is to be expected that a primary headteacher will feel more stressed if telephone calls (which he or she has to personally answer), visits and other interruptions take up most of their working day.

The presence of inspectors in the school is more stressful for primary than for gymnasium headteachers. Although the inspector is supposed to adopt an advisory role, and despite efforts being made in this direction, the experience of the recent past where the inspector really inspected, is still fresh in headteachers' minds. In primary schools, certain aspects of teachers' work are 'easily controllable': 'What do pupils' note-books and copybooks look like?', 'Is the date always written on a homework?', 'What about the right margins?', 'How well kept is the classroom?' and so on. Any negative comments about primary teachers reflect on their headteachers too, because they should have noticed teacher weaknesses and addressed them. In state secondary schools, the 'easily observable part' of teachers' work is not so essential, and headteachers are less responsible for the failings of specific teachers.

There is another very important reason why primary headteachers feel more stressed by the presence of inspectors in the school. Most primary state school headteachers do not have university degrees, while most of their secondary counterparts do. Since all inspectors should have postgraduate qualifications, the difference in qualification between an inspector and a primary head is typically larger than the same difference between an inspector and a secondary school head. Inspectors will probably treat secondary school headteachers as being equal to them, but this may not be the case with primary headteachers.

The issue of inadequate training in school management issues is more stressful for primary than for lyceum or technical school headteachers. This may be because primary school heads are less qualified than their lyceum or technical school colleagues.

That the *maintenance of school discipline* is reported as being more stressful for lyceum/technical headteachers than for primary headteachers is to be expected, given the different ages of their students. Primary school children are easier to manage, they depend more on their teachers and generally obey their instructions. Adolescents tend to be more independent, self-opinionated and can thus create more disciplinary problems.

Trying to resolve *disagreements among teachers or ancillary staff* is more stressful for primary than for lyceum and technical school headteachers. In Cyprus, one source of disagreement among the teaching staff is the decision at the beginning of the school year on 'who is going to teach what'. When the personnel of a school is stable for some years, these issues may not come to the surface. A lyceum or a technical school prepares its students for the final national examinations and the university entrance examinations, while no exams take place at the primary level. So even when the necessary transfers take place, care is always taken that in each of these schools there are 'experts' who will best teach the important subjects. This is not the case in primary schools, which are more numerous in number and where teachers' mobility is greater. Problems of assigning duties to teaching staff and consequent conflicts among such staff are therefore more likely to take place in primary schools and the headteachers feel more stressed by this factor.

Savery and Detiuk (1986) state that 'the primary principals perceive status to be significantly lower in society than their senior school colleagues'. In the Cyprus context, primary school headteachers are additionally less qualified, so they probably do feel that they have lower social status. A natural reaction to this perception is a sensitivity to any challenges to their authority, this being an explanation why primary headteachers assert that challenges to their authority are more stressful.

Inadequate training in school management is more stressful to the less experienced headteachers than to their more experienced counterparts. This may be expected since less experienced headteachers are probably less knowledgeable about how a school is best managed. They may therefore feel stressed by this lack of knowledge and inadequate training in school management.

Student achievement is more stressful for less experienced than for more experienced headteachers. Students' achievement is seen as a measure of how well a school is managed. It is to be expected that new headteachers will want to prove themselves by their students' achievements so that this factor is stressful for them.

Coping actions

Two of the top four coping actions identified by Cyprus headteachers are also reported by Borg and Falzon (1993) in their study of stress among teachers in Malta, another small island state. These are attempts to avoid confrontations – what Lowenthal (1987) calls the 'management of intimacy' – and to try and relax after work.

Results of this study suggest that Cyprus headteachers as a whole try to think objectively about a stressful situation. They seek to find out more about it and eventually take initiatives to eliminate the cause(s) of the stress. They develop realistic expectations and try to avoid confrontations which could cause them stress. Out of school they try to relax. These are the top coping actions they have themselves identified.

In line with the findings of Borg and Falzon (1993), it was found that female headteachers talk about their problems with someone else after work more often than male headteachers as a strategy to cope with stress. It is believed that women express their feelings more and that they probably share their problems with their friends more than men. Cyprus society expects the man to solve his problems alone.

Female headteachers resort more often than male headteachers to trying to find more about the situation as a coping strategy. Female managers are very rare in Cyprus society. Men usually do not like to have a female superior, and they are ready to criticise her for any minor mistake. So females who hold an administrative post have to be very careful. They have to try to find out more about a conflict or stressful situation, analyse it and take the right action, because they can be criticised more easily than men if they do not handle it properly.

Lyceum and technical school headteachers, more often than their primary colleagues, try to forget work when the day is finished in order to cope with occupational stress. This finding is not surprising. Primary school headteachers cannot so easily forget work after school is over. They teach for a considerably greater number of teaching periods per week. They have to be prepared and they have to correct their pupils' homework. Such tasks are typically performed by primary school headteachers at home.

Lyceum and technical school headteachers try to get advice from someone at work as a strategy for coping with stress more often than their primary school counterparts do. One explanation for this is that a lyceum or technical school head is more likely than a primary school head to find someone among their teaching staff who is experienced and who can provide useful advice.

Recommendations

The present study is the first to be carried out in Cyprus investigating an aspect of the stress affecting a cadre of educators. Naturally, further research would enrich our limited database and provide a means of identifying any trends across time.

The proportion of highly stressed Cyprus headteachers is higher than had been expected from the international research literature. Without directly comparing the findings of this study with other studies carried out elsewhere, it can be argued that the problem of stress among Cyprus headteachers in state schools is widespread and calls for corrective measures. Of the top four sources of stress indicated by the sample, three are related to the management of interpersonal relations.

Headteachers can hardly be expected to have any control over teacher absence or teacher quality, or even over teacher behaviour calling for reprimand. It is the responsibility of the overall educational system to find ways to reduce teacher absenteeism and provide schools with well-qualified teachers.

Primary school headteachers' overall stress levels are not greater than the overall stress experienced by secondary school headteachers. However, primary school headteachers differ from their colleagues in that certain stressors affect them more. This is probably a reflection of the differences in qualifications and perceived status between primary and secondary headteachers in Cyprus.

While the mere reference to occupational stress is unusual in Cyprus, in other countries organisations which involve jobs that create excessive stress levels that in the long term create health hazards for their employees are likely to face litigation. The outcome can be a compensation payment which sometimes exceeds the individual's loss of earnings (Savery and Detiuk, 1986). In any case, the crucial issue is the prevention of stress-related illnesses, the effectiveness and efficiency of the organisation, and the job satisfaction of the individual. The individual has a clear responsibility for taking the necessary steps to reduce personal levels of occupational stress. But without any organisational measures to assist employees to reduce and face stress, the individual can hardly succeed. As a first step, organisations should acknowledge and measure their employees' levels of occupational stress, remove the causes of the stress and, as a last resort, provide them with any training required to cope with any stress levels which cannot be reduced or removed.

DISCUSSION POINT

- 'Familiarity breeds contempt'. Does it also breed higher levels of occupational stress? Are headteachers in small states generally more stressed than their counterparts elsewhere? How does such a condition affect their professional and social life? What effective coping initiatives could be taken? Does multifunctionality contribute to, or soften, stress levels?

11

Research and Databases for Effective Planning: Focus on Malta

Raymond Camilleri

KEY ARGUMENTS

- Relevant educational data includes information derived from both macro/quantitative (national or systemic) and micro/qualitative (classroom) based settings.
- The purpose of data collection goes beyond the ownership of a purely statistical information base. Rather, it is concerned with promoting a research culture which backs decision-making processes at both the systemic and classroom level.
- Local politicians were initially sceptical as to the worth and applicability of the educational research carried out by local academics. The international recognition accorded to local research and researchers, however, has considerably improved the perceived relevance and standing of such local research to the policy-makers.
- Nevertheless, the transfer of research findings from academics to administrators remains ineffective. There are no formal channels through which research on local education can be synergised to meet the needs of both academics and administrators. Much local

research capacity remains largely unknown and under-utilised. Research findings in foreign countries often receive more attention from local policy-makers than do local, and presumably more valid, research efforts.

SMALL STATE CONSIDERATIONS

- The elasticity of data in small states is greater than in larger ones: a discrete statistic can matter considerably.
- Interpersonal informal contacts and networks play a key role in effective people management, as mediators of bureaucratic structures as well as information channels.
- The number of schools in a small state is such that a particular research exercise can be carried out nationwide, without having to resort to sampling techniques and subsequent concerns with the sample's representativeness of, and generalisability to, the whole population.
- Individual statements easily become public knowledge in small states and lead just as easily to rigid positions.
- Decision-making in small states is transparent and personalised: the choice of who actually undertakes research may be just as critical as who takes the decisions based on the results of that research. In either case, it could end up being one, clearly identifiable individual.

The uses of statistics

Any planning or decision-making process requires a good information base. The need of such information is more pronounced in small states where smaller numbers of everything result in a narrower margin of error (Bray, 1992). The information must be reliable, easily accessed and available at the right moment.

The planning carried out by the Education Division in Malta is based mainly on three instruments of data/information capture: statistical data concerning inputs, financial data in the form of a business plan and school development plans. Useful information may flow from the schools to the central administration, through informal contacts between the head of the school and an educational official, through established procedures between the heads and their respective section or through reports by education officials. Informal contacts may subsequently be formalised, but their importance cannot be minimised in a small society where interpersonal informal contacts and networks play a key role in effective people management. The informal contacts serve a double function: the department can have quick and real-time information regarding situations in a particular school; and a wisely chosen word to the right person at the right place and time can make all the difference between a request passing through all the bureaucratic procedures within a week and it taking a couple of months.

Officially, the Statistics Unit of the Education Division collects specific statistical data from both state and private schools in Malta. Such data includes student population figures, age profiles, student flows, provenance by locality, provenance by school and number of students by subjects or courses chosen. Performance indicators are limited to examination results. The Educational Assessment Unit (EAU) is the central unit responsible for assessment and examinations within state schools. It publishes an annual report on the Junior Lyceum examination and another report on the annual examinations. Both these reports shed light on both pupils' and schools' performance. The Matriculation Examination Board (MATSEC) produces two reports: one covering the Secondary Education Certificate (SEC) examination taken by students at the end of compulsory education and another covering the Matriculation examination taken by students at the end of their upper secondary education. These reports feature prominently during school staff meetings as a tool to review teaching methodologies and enhance the teaching-learning experience.

Data on staff is also collected through two electronic staff lists, one for the teaching staff and another for the ancillary staff (including clerical and minor staff). The teaching staff data includes personal details, teaching loads and subject or class taught. This data is captured at head office into a central database. Through such a statistical return, the Planning Unit also collects information on school premises, furniture and equipment.

The Education Division has to consider other indicators that go beyond the academic dimension of education. The Guidance and Counselling Unit carries out tracer studies of students to see how, and if, the skills the students acquired during their educational career fit in with the world of work. Other performance indicators can be tackled through independent market surveys in order to get a feedback from parents on the functioning of the education system.

The availability of data for planning or information purposes does not always respect the timeframe envisaged. The schools do not always send the required information on time. Verifying the data and allowing time for correction as explained above imposes additional time demands. The Statistics Unit at the Division is manned by one official and a clerk. This limitation of personnel also limits the amount of data that can be collated and analysed.

The Education Division's internal computer network upgrade has permitted the centralisation of collated data at the Planning Unit and has facilitated its access. This has the advantage that the input and verification of data is carried out by the clerical staff of the Planning Unit. This centralisation of data allows the maintenance of an audit trail and establishes a well-defined source for educational statistics creating a one stop-shop facility. Other departments or sections can access the data through the network.

As part of its strategy to provide information technology capability as a tool for educational administration and management functions, the Education Division throughout the 1990s embarked on the provision of a computer facility at every state school. Currently, all schools are equipped with computers for management and administrative functions, over and above the IT infrastructure for pedagogical purposes. The availability of computers for schools' management has led to the introduction of a School Information System (SIS). This software, which is customised to local needs, is a database containing data on all students enrolled in a particular school, as well as data regarding staff. All schools have an e-mail facility, making communication between schools and head office and among schools more efficient. This project has facilitated school management and decision-making since information can now be accessed rapidly, when and as required. The availability of IT facilities has opened possibilities for the collation of other performance indicators, such as school attendance. The scale factor of small states makes the maintenance of databases of resources (for example all teaching staff) at the central agency viable, thus facilitating the planning process and the management of resources.

To function efficiently and effectively, the databases in schools have to be maintained as an ongoing daily routine. It is not enough to introduce hardware and software in the schools. Heads of school have often complained at their lack of clerical staff (Attard, 1997, p. 47). The maintenance of the databases further aggravate this situation. In fact a spin-off of the introduction of IT was the employment of school secretaries on a contract basis, who are responsible for 'assisting the maintenance of the school's records management system ...' (Government of Malta, 1999). These school secretaries are employed in addition to a complement of school clerks who are also employed by the school.

School development plans

As from the 1997/98 school year, each secondary school in Malta had to draw up its own development plan. The process of school development planning is now well established in all Maltese primary and secondary schools. A school development plan (SDP) covers a maximum period of three years. The SDP is a rolling plan that is audited annually and adjusted accordingly. It is a collaborative effort with the participation of all teaching staff. Parents may also be consulted or asked to participate. Through the SDP, each school indicates the priority areas and objectives it aims to achieve.

In preparation for the annual self-evaluation, schools adopt various tools to collect evidence from parents, teachers and pupils regarding the achievement of the milestones envisaged in the plan. Through the audit, the school's teaching staff identifies lines for future actions that may include either a new development or a remedial action. A school may seek the support of officials from head office to address certain issues/weaknesses identified through the internal evaluation. The central agency studies the development plans and the internal evaluation results and uses them to identify areas where each particular school requires more support. The information gathered from the various schools creates an overall picture of national priorities for future developments, for remedial interventions, for training and for the provision of resources.

Business planning

Business planning within education is part of a civil service-wide initiative with the primary objective of providing Cabinet 'with accurate information regarding current resource allocations and proposed capital expenditures for each ministry' (Spiteri Gingell, 1995, p. 62). In 1993 all departments within the Maltese civil service drew up and submitted three-year business plans covering their programmes and initiatives for the period 1994–96. The process adopted in the formulation of the business plan was a bottom-up approach. For this purpose the Education Division was sub-divided into eight cost centres (the number of cost centres has since been reduced to six). Each individual unit within a cost centre drew up its own business plan and these were welded together into the cost centre's business plan. The business plans of all cost centres are then consolidated into the division's business plan.

Beyond its primary objective, business planning has brought about other 'subtle' benefits within each organisation. It has helped to cement the different departments within the division into one organisation with a core objective. All those involved in its formulation thus share a common vision. Business planning goes beyond the financial aspect since it stimulates thinking on what the unit can contribute to the organisation's mission and how the service can be improved. The process changes and broadens 'managerial attitudes towards programme responsibility and tangible, visible benefits such as improved data collection for decision making' (Spiteri Gingell, 1995, p. 63). At the end of each year, the unit's performance can be measured in terms of objectives achieved against the original plan, factors contributing to the non-achievement of the objectives can be analysed and where possible remedial action can be taken.

Research

Statistics and numbers are not enough to plan quality education. In formulating the new National Minimum Curriculum an unprecedented 'broad and continuous process of consultation' (Ministry of Education, 1999) was carried out. The end product thus mirrors national aspirations because of 'the broad based support that it has received from major stakeholders in the educational fields during the process of formulation and final approval' (Mizzi, 1999). This policy document will form the bedrock on which educational planning will be structured. The need for a democratic, participatory strategy for educational planning is a reflection of the greater emphasis being placed on the qualitative aspect. A qualitative approach to planning:

> *... views education as a living, moving thing, whose goodness resides not only in its excellence relative to certain 'standards' but in its relevance and fitness to the changing needs of the particular student and the society it is intended to serve.* (Coombs and Hallak, 1987)

Although the distinction between quantitative and qualitative planning may be an artificial one, it lends itself to creating an awareness of the need to look more closely at the educational system through qualitative research and not just via data collected through statistical returns. Furthermore, one must guard against coming to a hasty conclusion that a quantitative approach leads inevitably to low-quality education.

Husen (1989) distinguishes between two levels of educational research. *Macro-level research* usually employs empirical and quantifying paradigms; it is generally carried out for planning purposes and policy-making. This type of analysis gives a generalised picture that satisfies the policy-maker and planner who, by and large, are interested in the collectivity, so that generalisations suffice. *Micro-level research*, in contrast, looks at the classroom level, at the teaching–learning dynamic and how this can be improved to create the best conditions for the achievement of learning by the child. Husen warns that even this type of research can at best give only one perspective of the teaching–learning situation.

Micro-research has its pitfalls in that sometimes the results of such studies are generalised by practitioners and the research findings are applied to their class or to a particular child without analysing the individual needs of that child, his/her home background and the situational factors of the class. Husen (1989, p.352) warns that:

> *... the material of educational processes is young people and not metal, water or food. But first and foremost, the educational practitioner deals with a particular child here and now, a unique creature who does not fit perfectly into any general or abstract principles or scientific laws.*

In applying research findings to a class or a particular child, practitioners must make use of their own experience to guide them in their analysis of the situation and the application of research. This is '... the body of experiences and the critical analysis guided by research insights which permeates it' (Husen, 1989, p. 359). Macro-level research can thus contribute positively and substantially to the systems level. Micro-research can at best 'enlighten the practitioner [the teacher] who, to a large extent, has to rely on his or her connoisseurship' (ibid., p. 360).

The change in emphasis from a purely statistical information base to a research-backed decision-making process involving both quantitative and qualitative research, research at the systems level and research at the classroom level, means that the planning process must include a large research component and should ideally be contextualised in a research culture.

In a small state, the distinction between macro and micro analysis can to a certain extent be overcome, especially in terms of research at school level. The number of schools is such that a particular research project can be carried out nationwide, without the need for sampling techniques. For example, there are only four Junior Lyceums in Malta so any research at the micro level can include all four schools; similarly, the micro aspect can be translated into a macro view, because all schools are included. Even if the research concentrates on a particular year of education, it is possible to include the whole student population in a given grade (in Malta, this usually hovers around 4000). This approach removes the pitfalls of sampling and avoids generalisations.

The Faculty of Education

Before the setting up of the Faculty of Education at the University of Malta in 1978, there was little systematic research in the field of education by local academics. There were even less research efforts by the Department of Education.

The faculty pioneered research by local academics in the field of education. In the first instance, the academic staff in the faculty carried out local fieldwork to build the foundations for future research initiatives and to substantiate the theoretical aspects of their lectures within the local framework. Besides being part of their duties as university lecturers, research was also necessary to maintain the academics' own and the fledging faculty's international standing by publishing research findings in international journals and presenting papers at international fora. Faculty students also had to carry out research on local education as part of their undergraduate course work.

Much of this research was curiosity driven. It was carried out on the basis of the academics' own interests and was not necessarily directly linked or commissioned in order to analyse or propose policy initiatives. Such research has served to accumulate a great deal of (now historical) information on Maltese education.

Despite this, many of the research findings remain unutilised. Due to the lack of a traditional base of local educational research, politicians were sceptical as to the worth and applicability of research carried out by the Faculty of Education. The international recognition accorded to local research has now at long last caught up with the local politicians, who have recently started to seek more advice from local educational experts.

The transfer of research findings from academics to administrators is not highly effective. This means that the local research capacity developed over the last decade is largely unknown and underutilised. Very often, research findings in foreign countries receive more attention from local policy-makers than do local, and presumably more valid, research efforts.

Furthermore, the 'educational administrators working at the Department of Education (now the Education Division) and at the Ministry of Education have looked at the "curiosity research" emanating from the "ivory tower" with scepticism' (Mifsud, 1994, p. 161). The administrators are often critical, expounding the view that: 'Knowledge about "what works" or "what research tells us" is far from sufficient for the practitioner' (Husen, 1989, p. 352).

Such scepticism is not one-sided; there is a fair amount of suspicion or ambivalence between the faculty, on the one side, and the Ministry of Education and the Education Division, on the other. Both sides want to maintain a leadership role in the educational community; each wants to have a leading edge over the other. The fear of one side dominating the other has given rise to a breakdown in effective communication. Furthermore, individual utterances easily become public knowledge in small states and, once a position is taken, polarisation is likely to ensue (Farrugia, 1985).

Research in education is still mostly within the realm of the Faculty of Education. The Education Division has carried out some policy-oriented research such as, for example, on remedial education, special needs and streaming (Mifsud, 1994). Some education officials in the Education Division have also carried out original research and presented their papers at local and external educational conferences. The reason for the limited research activity of the Education Division is to be found in the traditional role of the civil service.

Within the context of the operations review carried out in the Education Division in 1992–93, the Planning and and Development Department (now the Department of Planning, Development and Infrastructure) was set up. One of the tasks delegated to this Department was the managing 'of research functions' (Department of Finance and Administration, 1996). This function covers a whole array of possibilities, including the commissioning of educational research, co-ordinating research, supporting research in other departments within the Division and carrying out its own. This follows from the new trend established as part of the civil service reform, whereby the different divisions of the civil service are being given the encouragement and responsibility of researching and developing policy. Within the context of Malta's participation in EU educational programmes, a National Eurydice Unit has been set up in the Education Division. Participation in the Eurydice Network has prompted the division to embark on educational research projects and the compilation of comparative qualitative indicators. Besides the educational value for policy-makers and decision-makers, the research projects enhance the research capabilities of the division.

Working together?

The Education Division and the Faculty of Education ultimately complement each other. They have to develop a closer working relationship based on the understanding that in the realm of research they are interdependent and mutually supportive. Research can be carried out on the basis of an ongoing working partnership. They can work together on a given project, utilising each other's quite distinct resources. This type of working relationship has already been developed in setting up a 'mentoring scheme', the 'Primary English Project' and action-based research on the Management Profile Log (Mifsud, 1994), and the national literacy survey. Within the context of the NMC, the various focus groups that have been set up to facilitate the implementation of the NMC include officials of the Education Division and academic staff from the Faculty of Education. This pattern will in due course facilitate the demise of the vestiges of reciprocal mistrust and cultivate closer co-operation between the two organisations.

The Strategic Plan of the new National Minimum Curriculum envisages the 'monitoring and researching [of] key factors and areas of concern relating to the National Minimum Curriculum' as a strategic goal of the National Curriculum Council (NCC) which was set up 'for ensuring transparency, participation and quality in compulsory education' (National Steering Committee on the Implementation of the NMC, 2001). Within the NCC's terms of reference, research in its various guises features prominently as a tool to assess the NMC implementation and its future development.

The Education Division and the Faculty of Education can also carry out parallel research on a given project. Such parallel research would require continuous contacts between the two bodies so that the results will be comparable. This would avert the danger that policy-oriented or evaluative research becomes a mere political instrument, 'serving only as a legitimisation and as a façade to rationalise what has already been decided' (Ketudat, 1985, p. 371). On the other hand, resource limitations linked to the scale factor may make a parallel approach to research wasteful. Research can also be carried out or commissioned by the teachers' union, by parent organisations and by other interest groups within the educational field.

Teachers as researchers

Research at the micro level can be carried out by teachers in their own schools. Thus research findings can have more relevance and enjoy strong applicability and validity to the immediate school and classroom situation. Teachers in different schools can work on a given project in their particular schools and then the results can be combined to present a broader picture at the national level. However, experience has shown that teachers still require an experienced researcher to co-ordinate and disseminate the findings of their research endeavours; that is, if they manage to find the time to do any research.

Teachers today are trained in research methodology as part of their professional educational formation. In a survey carried out by the Steering Committee in 233 schools (response rate 61 per cent), 14 per cent of respondents answered that their teachers were prepared to carry out research, while 28 per cent answered that teachers were resource producers (DeBrincat, 2001). They require support and encouragement from both the division (their employer) and the university (their trainer) to be able to develop themselves also as researchers, as well as teachers. Sabbaticals for teachers exist in some other countries and can be introduced to facilitate the allocation of time for research by teachers. If this possibility sounds farfetched in the light of Malta's limited resources, a more practical solution would be to give a lower teaching load to those teachers who want to carry out research. Another option which is even less financially demanding would be to award points for promotion purposes for any research carried out which has relevance to education.

The research work of teachers could be published in the division's newsletter. This would serve to create a space for dialogue on local educational innovations. The papers could also be published in *Education 2000*, the bilingual Journal of the Education Division, which provides an added encouragement for teachers to carry out research. Other high-level research work is targeted for peer-reviewed journals with international standing.

Research makes huge demands on time, and the government's timeframe is largely limited to the lifespan of a legislature. Reforms or changes in policy cannot wait for the results of a research project. Research also requires human, financial and material resources, and the state may have been obliged in the past, due to the lack of such resources, to assign a low priority to research. Relying on foreign experts for advice, especially if they formed part of an aid agreement, or adopting policies that were applied elsewhere without making them relevant to the local setting, would probably have been seen as a more cost-effective route than commissioning local research.

The results of such a policy trend can be seen in the flotsam left by several educational reforms that were shipwrecked after a few years of their implementation and by the trend to salvage reforms on the basis of other foreign-inspired initiatives.

The Planning, Development and Infrastructure Department is not the only part of the Education Division that formulates policy and carries out research. As has been indicated above, all the departments within the division have been given the task of developing policy in their respective areas. If they are to carry out policy development effectively, then they have to be given the time and the means to carry out this role. However, a prerequisite of successful embarkation on research is a culture change. The main focus of officials, such as Education Officers, has to move from administrative/managerial tasks to research in their area of competence.

The first difficulty that will be encountered in this new role is the shedding or minimisation of administrative duties in favour of more research. The same point applies, perhaps even more so, to the officials within the planning unit. They have been given the task of carrying out research, policy analysis and ongoing evaluation of the local educational system. The administrative tasks of the unit must be taken over by clerical staff if they are to concentrate on research endeavours.

Another difficulty is to convince politicians that research at the end pays. Politicians have to be convinced that having a basis of research findings before implementing a policy can be cost effective. This aspect is gaining ground, as evidenced by the launching of the national literacy survey and, more recently, by the setting up of focus groups which have been given the responsibility for developing 'new knowledge through action research carried out collaboratively in school communities together with teachers' (National Steering Committee on the Implementation of the National Minimum Curriculum, 2001, p. 58). We must remember that the decision-making process prevalent in small states is a transparent and personalised one; thus, the choice of who actually undertakes research may be just as critical as who takes the decisions based on the results of that research. In either case, it could end up being one clearly identifiable individual.

Besides, research can stave off a fair degree of interference from interested parties, as it would be too politically risky for any politician to decide on a policy that has been shown to be faulty or erroneous through research. The planning unit must be careful not to become a tool in the hands of politicians carrying out research only in the direction of policies indicated by the politicians. The whole spectrum of possibilities must be considered before an informed choice can be made.

If the political authorities are set to introduce research as a basis for policy formulation, they must be prepared to accept the changes proposed or suggested by the researchers. This is another reason why any serious research should be carried out by a unit independent of government. But if the politicians plod on regardless of what quality research suggests, then it is easy for researchers to become frustrated and to attach little or no effort to tasks that are likely to prove fruitless and mere exercises in window-dressing.

All the educational research generated locally should get as wide a distribution as possible. All concerned stakeholders should have access to details about what research is taking place locally. The results and inferences of any research effort should also be disseminated. Research papers published in educational journals will not reach all the stakeholders.

Here the media can play an important role in informing the general public without resorting to sensationalism, as this tends to distort the objectives and the results. The planning unit collates educational research carried out by university students as part of their degree course requirements, making it available to all those interested in consulting this source of accumulated knowledge. The division already publishes its own newsletter, *Eduforum*, which illustrates educational initiatives both at the centre and in schools. Developments in local education are also given prominence. It also provides a platform to celebrate and share good practice in schools.

The same can be said of the strong research output of the Faculty of Education, now numbering over 1600 students. A primary function of research is to create the basis for dialogue among stakeholders in the decision-making process. The Faculty of Education, in collaboration with the Education Division, publishes a bilingual educational journal carrying research papers and other articles on local education. The language used in this publication ensures that its circulation goes beyond academic circles and places local educational research within the grasp of a larger audience. The publication can also target parents with the view of explaining research findings and developments in education, presenting these findings in a less academic, more popular, format. It will also serve the purpose of initiating educational dialogue between parents and the division as a basis for further participation.

To be really accessible to a wider readership, research findings must be translated into a language devoid of scientific jargon that a lay audience can understand. Educational planners must be 'highly capable brokers with special skills in presentation' (Ketudat, 1985, p. 377). They need to cultivate skills which allow them '... to be political and evangelical, as well as analytical' (Kogan, 1978).

Finally, the Planning, Development and Infrastructure Department needs to build up stronger relations with international educational agencies, foreign research institutes and foreign universities to develop a network for the cross-fertilisation of ideas. Such a network could also provide a means of gaining access to international research trends. This would avoid the professional isolation that sometimes occurs in small states.

Recommendations

Given the scale factor, where the population is comparatively small and distances short, where both politicians and administrators are easily accessible, where the agency providing the service is very near to its clientele and where interpersonal relationships are well developed and serve as effective communicating channels, Malta should move towards an educational planning that incorporates the following proposals. These are subsumed under three broad headings: research, data collection and evaluation, and administration:

Research

- Local research should be the mainstay of future educational reforms. Research should be carried out during the analysis of policy, in the implementation phase and also as summative evaluation. It should aim at providing both quality indicators and quantitative data.
- Local research could be carried out by officials of the division, working in partnership with the University of Malta. Research could also be contracted out or commissioned by the division to whoever can provide the best service.
- Teachers could carry out research in their own schools. Teachers who are carrying out research could be given a lighter teaching load in lieu of time spent on research. Alternatively, if this is not possible due to staff shortages, they could be awarded points that will be taken into consideration when applying for promotion. The introduction of these conditions may have to be discussed with the teachers' trade union prior to implementation.
- Local expertise is available both in the division and the university; all that is required is for this resource to be tapped. Today many teachers, especially those coming out of university, may have the necessary skills to be able to carry out such research.
- The multifunctionalism expected of education officials should enable

them to move beyond the purely administrative and clerical aspects of their work. The principal role of these officials should centre around research, analysis and evaluation of policy and plans, together with support and monitoring of the learning–teaching process.

- Other interest groups, such as the Malta Union of Teachers, the Association of School Councils, the Malta Employers' Association, the Chamber of Commerce and the Association of Local Councils could be encouraged to commission research projects.
- Any research generated should act as a catalyst for stimulating participation and dialogue among the stakeholders.

Data collection and evaluation

- The planning process must move away from being based solely on the input dimension of plans. Emphasis should be placed on collating output data, on the relationship between inputs and outputs and, most importantly, on the process of education, that is the teaching–learning situation – what is actually happening in the classroom.
- The Curriculum Development, Implementation and Review Department is in a good position to evaluate and analyse data on the teaching–learning process.
- The information base available for decision-making has to be strengthened. It must include more qualitative indicators, emanating from research and evaluation, besides raw statistical data such as demographic trends, student populations, etc.
- Evaluation should be carried out both as a formative and as a summative tool in the planning and monitoring processes.
- Research findings, policy documents, local and foreign educational journals and publications should be available to all interested parties via the internet or in a documentation centre specifically geared to carrying out research.

- The potential of the information system must be fully exploited in order to provide readily available and reliable information. This requires that computer training becomes a continuous exercise and not a one-off training period. This will remove any difficulties or fear staff may have about using computers and thus facilitate access to information.

- The information base could be strengthened by developing networking with and among schools, as well as with other local institutions and agencies that have an information base, such as the Employment and Training Corporation.

Administration

- The new organisational set-up of the division requires lateral communication networks among the different departments. This can be attained by forming task forces from among officials belonging to different departments to tackle policy analysis and the drawing up of plans.

- Adequate administrative support staff and data entry operators must be available in each department within the division if the officials are to be relieved of their purely administrative role. This can be done either through the redeployment of clerical staff within the division or the recruitment of computer literate employees.

DISCUSSION POINT:

- **Units within an education department may consist of only one person. What are the implications of this for: (a) the normal workings of a bureaucracy? (b) the dependence on the incumbent? (c) flexibility? (d) the personalisation of the work involved, i.e. the inevitable association of the task with the person performing it? What happens when the individual concerned reports sick, is abroad or leaves the organisation?**

12

Structures and Expertise for Educational Planning: Insights from Vanuatu

Joe Jesse Dick

KEY ARGUMENTS

- The success of a planning unit within a ministry of education depends considerably on its ability to co-ordinate properly with other decision-making structures.
- Co-ordinating the planning function with other agencies may suggest a pooling of expertise; but it also ushers in problems of prioritisation, deference and conflicting perspectives to educational programmes.

SMALL STATE CONSIDERATIONS

- Because of scale constraints and limited human resources, planning related to the education sector in small states must often be 'shared' and 'pooled' with other state departments, the private sector and other exponents of civil society. The tight social field typical of a small state is not always an advantage in facilitating the necessary co-ordination.

- **A planning function can usually be found in departments or ministries of education in small states, even where the 'planning' nomenclature is not officially present.**
- **Planners in small states find themselves engaged in multifunctional tasks, including liasing with international organisations, aid agencies and the Ministry of Foreign Affairs.**
- **The use of foreign consultants in the education ministries of small states calls for specific management skills.**
- **Beware of the existence of false experts!**

Introduction

The major concern of educational planning in the archipelagic state of Vanuatu is to develop educational systems capable of responding to changing national situations and meeting the needs of national development. Vanuatu and comparable small states have at certain stages engaged in the re-adaptation and reorganisation of their educational systems in various ways and to different degrees in their attempts to meet local realities and objectives.

Education is a determining factor of national development; to achieve the educational goals and aims of any country, organisational structures have to be created and resourced with people as well as supported by adequate funding. An established structure and adequate resourcing – financial, human and material – are necessary for the successful implementation of plans and programmes directed towards achieving desired goals.

This chapter discusses some organisational aspects of educational planning. It begins by looking at the internal structure of the Ministry of Education in Vanuatu, particularly the size and role of the Planning and Implementation Unit. It next analyses the roles of other ministries, departments, the private sector and non-governmental organisations in assisting in educational planning such as in architectural designs and project co-ordination. The third and final section introduces an international dimension, discussing the use of foreign consultants in Vanuatu and providing a few examples of the impact of such foreign consultancy which the government has resorted to on a long term or short term over recent years.

The Planning and Implementation Unit – background

Vanuatu's national development plans have given high priority to developing the national capacity for planning and management in the education sector. A typical education objective would read:

> *... to improve the capacity of the Education Sector Administration to plan, implement and evaluate.* (Government of Vanuatu, 1987–91, p. 405)

It proposed the establishment of a Planning and Project Implementation Unit in the Ministry of Education, with clearly defined functions and structures, as a basis for improved policy formulation and implementation in the education sector. Reports from various donor agencies had drawn attention to the serious weaknesses in planning in the local education sector and thus supported the government strategy, stressing the need for the setting up and operation of such as unit as a first essential step in sectoral development. For instance, a 1985 AIDAB/UNESCO report referred to the setting up and operation of a Planning and Implementation Unit in the Department of Education as an absolute precondition for the sector's development. The World Bank 1985 *Education and Training Sector Review* also stressed that strengthening education planning should be a key priority. Reports tabled by the World Bank, UNDP and UNESCO have all drawn attention to the need for planning in the education sector. The World Bank made the establishment of the unit and the appointment of essential staff a condition for the credit effectiveness of the Primary and Secondary Education Project which has been jointly funded by the World Bank, Australian International Development Assistance Bureau (AIDAB) and the Vanuatu Government.

Structure and functions of the Planning and Implementation Unit

The Planning and Implementation Unit (PIU) was set up in 1989–90 to increase efficiency in the education sector. The unit operated under the umbrella of a mission statement which clearly outlines its structure and functions. The unit's functions are adopted from the Second National Development Plan (1987–91). It operates under the authority of the Director General of Education, to whom it reports directly. It is headed by a Principal Education Officer (Planning and Implementation), assisted by four professional and two support staff. The work of the unit has been guided during its first five years by an expatriate adviser with the title 'implementation adviser' provided under the Primary and Secondary Education Project.

The Planning and Implementation Unit works in close co-operation with other divisions and sections of the Vanuatu Department of Education. It has an overall planning, monitoring, co-ordinating and evaluating function; but existing executive and administrative responsibilities remain with the Director General of Education and his senior officers (Principal Education Officers). Within the framework of established government departments, the Planning and Implementation Unit advises the Director General on all matters related to the formulation, implementation, monitoring, co-ordination and evaluation of education sector plans, programmes and projects. In carrying out its functions and responsibilities, the unit works with other government departments, as well as with donor agencies and their representatives and with non-government organisations, as and when appropriate.

The unit's main functions are:

- Collection, analysis and reporting on statistical data and carrying out and reporting on analytical surveys and research studies on all aspects of education and training (National Planning and Statistics Office (NPSO));
- Assistance in developing and updating procedures for planning and monitoring resource use and allocation in the education sector (NPSO, Department of Finance);
- Carrying out policy and implementation research and analysis, identification of alternative strategies, preparation of recommendations as an input into senior management decision-making (NPSO);
- Preparation and finalisation of sector plans, development of programmes and projects for the orderly attainment of national policies and sector targets (NPSO);

- Monitoring, co-ordination and evaluation of sector plans and of local and external aid programmes and projects, with particular reference to the Primary and Secondary Education Project (NPSO, Department of Finance and Public Works Department);
- Identification and appraisal of programmes and projects for local and external funding, preparation of project proposals and related documentation (NPSO);
- Liaison with donor agencies including, *inter alia*, preparation and finalisation of progress reports, arrangements for visiting missions, review and evaluation of all donor reports and other documentation (NPSO);
- Recruitment of international staff, consultants and specialists, and appointment of national staff assigned to externally funded project activities (NPSO, Public Services Department);
- Preparation of manpower development and staff training plans for the Department of Education, including co-ordination of fellowship/attachment programmes and externally funded regional and in-country programmes (NPSO, Public Services Department).

Roles of the professional staff

The organisation of work in the Planning and Implementation Unit is twofold. The Senior Education Officer, Planning and the Education Officer, Statistics who work in the Planning Section deal with the planning of the education sector, carrying out such functions as:

- Collection, analysis and reporting on statistical data;
- Execution and reporting on analytical surveys and research studies in all aspects of education and training;
- Undertaking policy and implementation research and analysis, identification of alternative strategies and preparation of recommendations as an input into senior management decision-making;
- Preparation and finalisation of sector plans and policies;

- Drafting manpower development and staff training plans for the Department of Education.

The Senior Education Officer (Implementation) and the Education Officer (Operations) who work in the Implementation Section execute such functions as:

- Preparation and formulation, monitoring, implementing and evaluation of programmes and projects in the education sector;
- Identification and appraisal of programmes and projects for local and external funding, preparation of project proposals and related documentation;
- Liaison with donor agencies, including the preparation and finalisation of progress reports;
- Arrangements for visiting missions;
- Review and evaluation of all donor reports and other documentation;
- Recruitment of international staff, consultants and specialists for externally funded project activities.

The Principal Education Officer who heads the unit has the overall responsibility for the planning, direction and co-ordination of the work of the staff of the unit and for ensuring its efficient function.

The officers of the unit are not always restricted to carrying out their specific jobs but are involved in a range of duties. For example, the SEO (Planning) also prepares project proposals, appraises programmes and projects and liases with aid donor agencies. The EO (Operations) assists the EO (Statistics) in the collection and compilation of statistical data.

Roles of other ministries and departments

In many countries of the world, and especially in many small states, certain key tasks related to education are delegated to other state bodies and are not undertaken by the Ministry of Education. Thus, officers in the Ministry of Education have to establish a strong liaison network with their counterparts in other ministries. Bray (1992) referred to some such practices:

- *Statistics:* in Botswana, school statistics are collected and processed by the Central Statistics Office; in Solomon Islands and Montserrat, they are processed by the Ministry of Finance.
- *Buildings:* in the Seychelles, Brunei Darussalam and Dominica, most responsibility for state school buildings rests with the Ministry of Works.
- *Printing:* in Dominica, all printing is done by a Central Government Unit.
- *Examination results:* in Guyana, examination results are processed by the National Data Management Authority.

One could argue that when work is distributed in this way, there is the advantage of the Ministry of Education gaining access to the expertise of other ministries. However, a potential for drawbacks exists. Bray (1992) refers to a 1977 report in Botswana where some good quality education statistics were underutilised by the Ministry of Education mainly because the Central Statistics Office had collected the data. Such an incident demonstrates the need to maintain good links to avoid such problems.

There are three main government departments in Vanuatu which have strong links with the Ministry of Education. These are the Department of Youth and Sports under the Ministry of Home Affairs; the Public Works Department under the Ministry of Public Works, Transport and Telecommunications; and finally the National Planning Office under the Prime Minister's Office.

Department of Youth and Sports

The Government aims to ensure that young women and men are assisted, supported and encouraged in the developments of their skills, knowledge and resources to enable them to contribute more fully to the ongoing social, political, economic, cultural and spiritual development of their families, communities and country. (Government of Vanuatu, 1987–91, p. 70)

Since the mid-1980s, the Department of Youth and Sports has been co-ordinating life-skills training courses with other organisations such as churches and community groups in fulfilment of the these national objectives. The courses provide participants with training in a variety of practical skills aimed primarily at assisting young school leavers to fulfil a useful and satisfying role in their community. The courses offered by the rural training centres are primarily in mechanics, carpentry, small-scale agriculture for boys, and sewing, basket weaving and building water tanks for the girls. The majority of the nine vocational training centres are church-run but they are co-ordinated by the Department of Youth and Sports, which provides them with a modest annual grant.

Public Works Department

Responsibility for architectural designs and constructions of educational facilities rests with the Public Works Department. The department has its own architects, civil engineers, designers and draughtsmen who design the school buildings. However, for any big and donor school building projects, architectural design are usually contracted out to private architectural firms. The Public Works Department also contracts out the construction of educational infrastructure to private companies. It is government policy that all state infrastructure is dealt with by the Public Works Department. Thus the Department of Education liaises very closely with the principal architect of the Public Works Department. The department has a decentralised administrative structure which shadows that of the Department of Education, with five regional headquarters, each with an architect based in the region. School building construction activity undertaken in the outer islands of Vanuatu is supervised and monitored by these region-based architects.

There are certain drawbacks to this arrangement, especially in the architectural design of the school buildings. There are often long delays caused by the architectural section of the PWD missing the deadline for producing school architectural designs or plans. The section has its own work agenda and educational school building plans are often not given priority. Secondly, most of the school building designs do not concur with what the Department of Education wants and this often leads to delays in trying to modify the designs. As Hallak (1990) cautioned, designers are often more concerned with the aesthetics of the building than with providing functional, safe and comfortable teaching space. These two considerations should be combined, but in practice they are often not reconciled. This occurs with private architectural firms as well. Problems also result from the failure of the Department of Education to employ a qualified architect who would at least provide professional judgement about the school building designs and plans submitted by the Public Works Department and private architectural firms.

National Planning Office

The National Planning Office is the state machinery which employs assistant planners who are each assigned to look after a particular state sector. There is thus an assistant planner who deals with matters concerning the education sector and has two main duties. The first is to appraise projects and proposals submitted by the Department of Education and to co-ordinate and liaise between the Department of Education and any aid donors involved in the projects. Secondly, according to government policies, the assistant planner represents the Director of National Planning as the formal point of contract for the Department of Education regarding the preparation of five-year national development plans. In the preparation of the national development plans, he has to consult the Principal Education Officers, the Director General of Education and the Minister of Education on what the government wants over the forthcoming five-year plan period. After consultation, the assistant planner, in collaboration with the senior officers of the Planning and Implementation Unit, is expected to write up the education sectoral plan for the next five years. Apart from these and other duties, the assistant planner (education) also represents the Director of the National Planning Office on all high-level aid talks involving the education sector.

Non-governmental organisations in educational planning

The constraints imposed by economic and financial conditions have often led to many services not being attended to by government which are then taken on by voluntary organisations. In Vanuatu, the government has concentrated more on the formal educational system. International literature often points out that it makes economic and managerial sense for the government to encourage and facilitate the undertaking of certain tasks by voluntary organisations or ensure that these are properly contracted out to the private sector. Thus, in Kiribati pre-schooling is left to parents and to such private organisations such as the Save the Children Federation and the Kiribati Pre-School Association. In Barbados the government has contracted the British Council to operate a major project in education and training to support its human resource development needs.

One of the most renowned local non-governmental organisations involved in the planning and management of pre-schooling is the Pre-School Association of Vanuatu. Since 1980, communities and individuals have shown a strong commitment to pre-school education, which they finance themselves. In 1992, the Pre-School Association started drawing up guidelines for local communities in collaboration with the Primary Division of the Education Department. The guidelines relate to the criteria for setting up a pre-school, pre-school teacher training, minimum pre-school educational infrastructure standards and requirements, and a modular-based curriculum.

Recruiting foreign consultants for educational planning

In many small states, the government often hires, or is obliged to accept, foreign experts or consultants to advise on education planning, teacher training, curriculum planning and implementation, and preparation of particular educational projects. These foreign consultants are hired on a short- term or long-term basis, depending on the nature of the duties required. Such consultants are often engaged because of the limited pool of local qualified personnel. Even if the education ministries of small states have these local experts available, the latter may often lack sufficient time to do the work undertaken by the hired consultants, or may lack national credibility and respect for their specialist skills.

Nevertheless, the resort to foreign consultancy brings its own set of constraints. With all the goodwill in the world, the foreigners concerned may have limited cultural understanding or appreciation of the context in which they work. Furthermore, they are likely to have had previous experience in medium-sized or large countries, and this can result in recommendations which may prove insensitive or even inappropriate to small countries. As they go about their work, they may disregard the intricacy of small societies and the crucial role of key personalities (Bray, 1992).

When the Planning and Implementation Unit was established in 1989, much of its human resources were devoted to the implementation of the Primary and Secondary Education Project, co-financed by the Australian International Development Assistance Bureau, the World Bank and the Vanuatu Government.

A 1992 report by a short-term consultant engaged by the United Nations Development Programme (UNDP) remarked that educational planning in Vanuatu would greatly benefit from the presence of a long-term planing adviser attached to the Planning and Implementation Unit. The level of expertise in the unit was described as 'generally low'. While the Principal Education Officer of the Planning and Implementation Unit was deemed competent in educational planning, his workload leaves little time for carrying out such activities or for training staff. While there is scope for improvement through better staff management, most progress will be achieved only by having an adviser work side by side with the staff.

In fact, since its establishment in 1989, the Planning and Implementation Unit has enjoyed the services of a long-term consultant – known as the Implementation Adviser – advising on the preparation, planning and management of educational projects. In 1992, a short-term planning officer seconded from the National Planning and Statistics Office worked for a probationary period of some months with the unit. However, the UNDP refused to confirm his three-year contract after the probationary period because he was found not to be the qualified and experienced educational planner he had claimed to be. As Farrugia and Attard (1989) warn, some individuals may claim to be experts but are not necessarily so. Baldacchino (1997, p.82) has aptly suggested that these are 'pseudo-experts'; their credentials may be dubious, while their actual knowledge and techniques may be very limited or even obsolete.

The Planning and Implementation Unit commissioned five separate studies regarding planning aspects of the education system of Vanuatu between 1991 and 1994. Four of these studies were undertaken by foreign consultants and one was carried out by a foreign curriculum adviser working for the Vanuatu Government. Four of the five foreign consultants were hired under the Primary and Secondary Education Project while one was funded by the New Zealand Government. One of the approved reports was subsequently found to have failed to address one of the requirements of the terms of reference. It later emerged that this particular consultant had not been continuously reporting his work progress during the course of the consultancy period, while the Department of Education had failed to assign an Education Officer to closely monitor the consultant's work. This is just one example of the difficulties encountered by small states in the use of consultants' work, even when such services are financed or co-sponsored by external funds.

Farrugia and Attard (1989) raise a number of important questions which senior education administrators need to ask and evaluate honestly before engaging foreign expertise:

- Is local expertise really not available?
- Will the presence of foreign experts support and enhance the standing of local personnel, or will it undermine and lower their morale and status?
- To what extend will the foreign experts' contribution perpetuate dependence on ideas, concepts and solutions emanating from overseas at the expense of indigenous initiatives?

To fully maximise the benefits of a foreign consultant's visit, the following advice may be tabled to officials in small states:

- have a local counterpart as an understudy;
- share widely the expertise of the visitor(s);
- prepare for consultancy in detail;
- establish clear parameters.

Conclusion

Governments of all states have to create the right organisational structures and employ the right personnel with appropriate expertise to plan and implement the government's educational policies, aims and objectives. Financial, administrative and human resource specifics faced by small states often prevent their governments from establishing special units or jobs to execute a particular function. However, that does not mean that the function is not undertaken at all. In many small states, the word 'planning' may not appear in the title of any unit or post; but planning may still be satisfactorily undertaken by one or more staff in other sections of the Department of Education.

In Vanuatu, the Department of Education has a Planning and Implementation Unit which deals with general educational planning, project planning, implementation and management of educational projects. However, Senior Education Officers should not depend entirely on any such unit to carry out overall educational planning. More micro-planning is required at section level in collaboration with education personnel at the regional level. The Planning and Implementation Unit also needs to carry out some on-the-job, in-service training on planning issues, methodologies and techniques for heads of sections to enable more effective micro-planning of the education sectors to take place. For proper educational planning there is a need to establish a stronger working relationship and co-operation between the Planning and Implementation Unit and other sections of the Education Department where ideas can be shared and formulated into proper educational goals, aims and objectives.

Because of government policy procedures and limited educational resources, other planning skills and roles are carried out by other government ministries, the private sector and the community at large. Closer working relationships and better liaison networks need to be improved on. Senior officers of separate departments need to visit each other regularly and discuss issues which are of common concern to both sides.

Finally, this chapter has sought to briefly highlight the value which foreign consultants can bring to the planning tasks within a Ministry of

Education. The Vanuatu experience suggests caution in the use of foreign consultants and identifies possible problems related to their involvement in an education context.

DISCUSSION POINT

- Why is it that those Ministries other than Education which provide services to the education sector either tend to do so grudgingly or give very low priority to Education's needs?
- What knowledge about your country (if any) would you expect a foreign educational adviser to possess before commencing his/her assignment in your country? Are any 'small state' considerations included? Justify your answer.

13

Planning the Professional Development of Primary School Teachers in the Seychelles

Christian Cafrine

KEY ARGUMENTS

- Teachers require their own brand of 'adult education' and 'professional development'.
- The consideration of primary school teachers as professionals must incorporate their standing as researchers, critical inquirers and reflexive practitioners.
- Teacher development also goes hand-in-hand with contextual features related to school improvement. The latter include the specific school climate and culture, school organisation, the exercise of leadership and a concern for quality in educational output.

SMALL STATE CONSIDERATIONS

- A small state without local infrastructure for tertiary education would have to send off personnel to study in institutions elsewhere. Such a policy may also make sense cost-wise. This exercise usefully

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opens up the beneficiaries to wider, international experiences and militates against professional isolation. However, not all lessons learnt abroad can or should be transposed, and this may lead to feelings of demotivating frustration.

- **When the total number of teachers is small, it may prove more difficult to release any for such professional development initiatives as in-service training or overseas placements.**

Teachers are also adult learners

The need to increase access to further education and training opportunities for adults in the Seychelles was identified as an area of priority in the 1990–94 National Development Plan, as reflected in the following statement:

Efforts will be expanded in the Plan period to allow for self-study and access to continuing education programmes so that adult candidates acquire the pre-requisites to follow formal training in priority areas.

Teachers are no doubt adults by definition, so this statement considers them as potential candidates for relevant continuing education programmes. However, the need to strengthen the general educational foundation on which a substantial number of Seychellois primary teachers can build their own professional training has not yet been effectively addressed. The tendency has been to look at training as an end in itself, rather than as a vehicle for long-term educational and socio-economic development. Since teacher development also entails identifying those with potential and ensuring that this potential is developed and used to the full (Commonwealth Secretariat, 1995), then training proper should be seen as integral to such a process.

There have been several projects whose aim has been to uplift the qualifications of the 570 primary school teachers who work in 25 schools in the Seychelles archipelago. Ironically, however, the tendency has been to provide further training mainly for those who are already the holders of higher academic qualifications. To some extent this is understandable because more emphasis has been placed on further education for marketable professional qualifications. Since this further training has generally taken place at universities abroad, only those with the most internationally credible and valid academic qualifications have been selected to participate in the relevant programmes. However, the fault lies in the failure to implement an appropriate parallel in-service education or support programme in the local context, with the aim of upgrading primary teachers from their actual academic or pedagogic competence, while also taking into account their general professional growth.

A programme to this effect would be worthwhile for at least two main reasons: successful completion of the programme would boost the morale and professional self-esteem of the teachers in question; the general academic level and study skills of potential beneficiaries currently falls short of what they would require to cope adequately with the level of work on the Diploma 1 Programme offered at the Seychelles Polytechnic.

Being obliged to seek higher education abroad has provided opportunities for a large number of Seychellois teachers to undertake studies at university level while vastly broadening their experiential and learning horizons. In several ways, this has been beneficial to the education system as a whole. Such benefits have included:

- The possibility for more teachers to be trained up to degree level prior to their appointment;
- In-service training for teachers to upgrade their professional qualifications;
- Additional expertise and insights gained by the participants through mixing with scholars and practitioners from other countries.

Also potentially very useful for educational development is the sharing of ideas and experiences with colleagues in, or destined for, similar teaching posts, once the knowledge and skills mastered abroad are fed back into the local education system.

In the local teacher education context itself, the main factors that have impinged on the effective development of an ongoing in-service education programme for primary school teachers include:

- The small size of the teacher education institution and its limited number of qualified personnel;
- The absence of part-time in-service teacher education provision;
- The difficulty of replacing teachers who study full time, because of teacher shortages;
- The difficulty of obtaining funding for the development of alternative programmes (for example distance education);
- Problems arising from centralisation, for example dependence on the Ministry of Education to initiate programmes or provide funding;
- The absence of active professional organisations (such as teachers' trade unions or teachers' staff associations), whose involvement could provide an impetus to the setting up of INSET programmes for primary teachers.

Linkages

In general economic terms, given the small number of teachers involved, it is usually more viable to send teachers overseas for in-service education. One of the longest such programmes held in partnership with another institution involved the University of Sussex and the Seychelles Polytechnic in training secondary teachers to B.Ed. level (1984–94). A similar linkage programme, but for a shorter duration, was set up in collaboration with Edith Cowan University in Western Australia, explicitly for primary school teachers. However, the limited number of national candidates who had the necessary qualifications was exhausted in four years (1992–95). Furthermore, although 20 primary teachers undertook this programme, they were transferred to secondary teaching posts and promoted to Studies Co-ordinator, or even to Assistant Curriculum Development Officer very soon after their return. This observation deserves serious scrutiny.

Teachers development: moving from quantity to quality

Teacher education or teacher development is a continuum of learning. Teacher development and school improvement must go hand in hand. You cannot have one with the other. (Fullan, 1991, p. 289)

The idea that teacher development and school improvement must be intimately reciprocal has major implications with regard to improving the quality of education at primary level in Seychelles. Improvement of both teachers and teaching is required in order to raise the standard of education. This is to say that improving education cannot be seen simply as a question of quantity, such as extending the duration of compulsory schooling, building more schools, training more teachers, and providing more books and other resources (Lawton, 1994).

It is quite clear that professionalism has a number of (sometimes contradictory) meanings, and that it can operate at a number of different levels in analysing teachers and their work. It may be argued that there are certain inherent qualities which denote a profession (trait theory), while it can also be viewed as a process of external persuasion, elite support or as a form of state licensing or control over teachers' work (Lawn, 1989, p. 153). There is also considerable agreement that professionalism invariably involves skills, a process of reflection, making judgements, and acting at the school level and in the public sphere. However, a brief review of three concepts associated with professional behaviour in teaching is relevant. These concepts are the 'restricted' versus 'extended' professional (Hoyle, 1974), the 'teacher-as-researcher' (Stenhouse, 1975) and the 'reflective practitioner' (Schon, 1983, 1987).

Understanding teachers as professionals

Restricted and extended professionals

Hoyle and Meggary (1980) argue that professional development involves a two-way process between two concepts. The term 'restricted' refers to 'a professionality which is inhibitive, classroom-focused, and based on experience rather than theory' (ibid., p. 49). According to this view, the good restricted professional teacher 'is sensitive to the development of individual students, is an inventive teacher and is a skilful class manager. The person is unencumbered with theory, is not given to comparing his work with that of others, tends not to perceive classroom activities in a broader context, and values classroom autonomy' (ibid.).

The 'extended' professional, on the other hand, 'is concerned with locating classroom teaching in a broader educational context, comparing one's work with that of other teachers, evaluating one's own work systematically, and collaborating with other teachers' (ibid.). Extended professionals are also interested in theory and current educational developments. They read educational journals, become involved in various professional activities, are concerned to further their own professional development (mainly through in-service work) and also consider teaching to be a rational activity amenable to improvement on the basis of research and development.

Teachers would probably identify themselves (and others as well) as belonging more or less to either the restricted or extended professional group; but these two notions must not necessarily be taken to suggest any value judgements. They can be used as descriptive categories that could most usefully be interpreted as the extreme ends of a continuum.

This view of teacher professionalism is one which has been heavily criticised by Lawn (1989), who views Hoyle's categories as implicitly gender biased, due to an unfortunate tendency to categorise female teachers as restricted and male teachers as extended professionals. Lawn subscribes to the view that professionalism is less a concept which divides teachers into those who have more or less of it (i.e. restricted or extended), but rather into teachers who are conformist or nonconformist (Carr and Kemmis, 1983).

The teacher as researcher

The notion of 'teacher-as-researcher' is intended to encourage teachers to become involved in their own practice, to view themselves as researchers (Stenhouse, 1975), to adopt more of a research attitude to their ordinary lives as teachers (Allwright, 1983) and to become 'action researchers' in their own classrooms and schools (McNiff, 1988). There are various other reasons why teachers should engage in investigative/inquiry activities in their classrooms; but the concern here is with those that relate to the relationship between teachers-as-researchers and teachers' ongoing professional development.

It is in relation to the idea of professional development that Hoyle's notion of the extended professional and Stenhouse's notion of teacher-as-researcher come closer together, as indicated by the following statement:

> *The outstanding characteristic of the extended professional is the capacity for autonomous professional self-development through systematic self-study, through the study of the work of other teachers and through the testing of ideas by the classroom research procedure.* (Stenhouse, 1975, p. 144)

'Autonomous professional self-development' in this particular case is consistent with the idea of teacher development, since it is an ongoing process which largely involves teachers using their own experiences and goals as a primary source of learning in order to recognise, understand and improve their own practices.

The reflective practitioner

It was basically Stenhouse's work which led to what Carr (1989) calls a more defensible notion of teacher professionalism. From this, Schon (1983, 1987) developed an epistemology of practice which places technical problem-solving within the broad framework of reflective inquiry (Carr, 1989). Schon uses two central concepts to construct this epistemology of practice. These are 'knowing-in-action' and 'reflection-in-action'. The first concept refers to the professional knowledge that professionals actually use, which is implicit in their action and often difficult to describe: the professional 'know-how' revealed in our intelligent action. The second concept, reflection-in-action, refers to the process which is seen as central to the 'art' by which professionals deal with 'problematic situations'. It occurs in situations when the professionals' repertoire of knowledge – their 'knowing-in-action' – is no longer adequate, when:

> *... routine responses produce a surprise ... Surprise leads to reflection within an action-present. We consider both the unexpected event and the knowledge-*

in action that led up to it ... we think critically about the thinking that got us into this fix. (Schon, 1987, p. 28)

Reflection-in-action is a process through which the development of professional knowledge and the improvement of professional practice occur simultaneously. Knowledge implicit in action, hitherto taken for granted, is made explicit, critically examined, reformulated and tested through further action (Carr, 1989).

In his analysis, Schon (1983) suggests that any practitioner's theories of action need to be teased out by means of careful reflection on practice. Practitioners themselves become theorists when they reflect upon their practice because in so doing they, too, are 'theorising'. This has special significance in the case of untrained and 'traditional' teachers because, like all teachers, their action is also based on some sort of theory, although it may not necessarily be explicitly or consciously articulated. The training and professional development of teachers, must, therefore, be considered also to help them become more aware of, and reflect on, their own theories and practice in an endeavour to improve the latter.

Implications

The implications of these views for the development of primary school teachers in Seychelles is quite evident. The preparation of pre-service teachers can be geared towards enabling trainees to develop a spirit of inquiry from the early stages of their training program. For example, they can be introduced to the idea of testing particular theoretical principles and practical techniques against each other in a continued process of experimentation (Widdowson, 1984), in order to achieve better understanding of the relatively 'new' approaches to teacher education which the vast majority of Seychellois teachers have not experienced. Teacher professional development is not just about improving 'chalk and talk' performance, but needs to consider the concept of teacher-as-researcher by promoting and assisting teachers' development of skills in planning, executing and evaluating small-scale experiments and investigations in their own classrooms and/or schools.

Teacher development and school improvement

The literature on teacher professional development and school improvement indicates an increasing convergence of ideas and theoretical concepts between these two specific areas of study, which are now perceived as complementary in the pursuit of (quality) improvement in educational provision. Teacher development is paramount because of the way in which it feeds directly into the quality, range and flexibility of their classroom work (Hargreaves and Fullan, 1992). He argues further that:

> *Teacher development, teachers; careers, teachers' relations with their colleagues, the conditions of status, reward and leadership under which they work – all these affect the quality of what they do in the classroom.* (Hargreaves and Fullan, 1992, pp. ix–x)

Staff development and organisational development are '... the gestalt for school improvement which in turn would lead to maximum personal growth and a better atmosphere for effective school change' (Wideen and Andrews, 1987, p. 2).

The above statements are indicative of a critical need to place teachers at the centre of any improvement effort, by assuming that their work, their visions about improving it, teachers' careers as a whole, their hopes and dreams, their opportunities, aspirations and frustrations are all important for teachers' commitment, enthusiasm and morale (Wideen and Andrews, 1987). It is mainly for these reasons that the professional development of primary school teachers should be given precedence in any school improvement plan.

The school climate and culture

> *The processes and success of teacher development depends very much on the context in which it takes place. the nature of this context can make or break a teacher development efforts.* (Hargreaves and Fullan, 1992, p. 13)

Personal and professional growth requires autonomy, initiative and commitment on the part of teachers, but they cannot go all the way on their own or do it all in a vacuum. The context of their working environment is important in providing conditions in which teacher development initiatives either succeed or fail. These conditions range from factors such as class sizes, the quality and availability of texts and instructional materials and teacher workload, to various other professional aspects of the school in general, such as leadership, staff relationship, collaboration and collegiality.

Lawton (1994, p. 5) considers ten characteristics as prerequisites for an effective school culture. They are:

- A commitment to clearly and commonly identified norms and goals;
- Collaborative planning, shared decision-making and collegial work in a framework of experimentation and evaluation;
- Positive leadership in initiating and maintaining improvement;
- Staff stability;
- A strategy for continuing staff development related to each school's pedagogical and organisational needs;
- Working to a carefully planned and co-ordinated curriculum that ensures sufficient scope for each student to acquire essential knowledge and skills;
- A high level of parental involvement and support;
- The pursuit and recognition of school-wide values rather than individual ones;
- Maximum use of learning time;
- The effective and substantial support of the responsible education authority.

However, even Lawton emphasises the need to view these characteristics as aspects of culture only, and acknowledges that simply working to improve these features in isolation from the top or from the outside would not produce a better school. School improvement '... is a much more complex question of school-based cultural change' (ibid.).

With regard to improvement, focusing on the individual school as a unit is imperative because each school has a unique but complex culture that moves and shifts as new ideas are advanced and accommodated (Lieberman and Miller, 1992). Such a school culture is derived from the interplay of a number of variables. These include motivation, commitment, morale, tensions and personalities. There is a need to adopt a dialectical perspective on critical reflection: one which recognises that for schools to change they need the informed commitment of teachers, in much the same way that teachers need the informed commitment of the institution in which they work in order for them to change. Staff development and school development are mutually reinforcing.

School organisation and leadership

The arguments raised have highlighted the critical relationship between teacher professional development and the nature of the institution within which they work. Leadership is another significant factor that affects the success of teacher development and, therefore, of school and educational improvement as well. The implementation of strategies for involving teachers in decision-making, for example, or the valuing of staff contributions and initiatives, developing school cultures in which teachers work closely together and support each other in improvement and change processes (Hargreaves and Fullan, 1992) are all dependent on the prevalent leadership style in a particular school.

Frase and Conley (1994) suggest a Total Quality Education approach, wholeheartedly adopted in contemporary good management practice and which carries a strong message about desirable school leadership for the future. School principals or headteachers, are presented as leaders who successfully encourage and provide opportunities for teachers also to lead. As leaders, the principals realise that leadership and school improvement require a team effort on the part of administrators and teachers; they realise that they have a crucial role to play by continually seeking to improve the systems that affect teachers' work.

Further, they must provide work settings where teachers can successfully teach their students and thereby gain the resulting satisfaction and motivation to improve their skills and enhance their career development. (Frase and Conley, 1994, p. 11–12)

In the pursuit of a supportive working environment, collaboration, collegiality and professional growth, leadership is taken further to include teacher leadership, whereby teachers can be actively engaged in collective and collaborative problem-solving, in seeking new roles, in advocating educational change and in taking risks (Lieberman and Miller, 1992). The empowerment of teachers in this manner will not only enhance their professionalism and boost morale, but also enhance their role as educational and social change agents (Elliot-Kemp, 1986; Hewton, 1988).

School effectiveness and school improvement

Discussion and research on school effectiveness have generally resorted to criteria relating to organisation, quality of leadership, whole school approach to curriculum, teachers' classroom behaviour and the school climate or ethos (Reynolds and Creemers, 1990). Such research findings suggest that:

... the mechanisms and processes which lead to greater effectiveness are of general applicability. (Sammons, 1994, p. 46)

Change, teacher development and quality improvement

Implementing effective, lasting change in education is normally a long and arduous process that may involve considerable trial and error. One main reason for this is that any attempt to achieve educational change must first take into serious consideration the implicit requirement for the people who make up the system to change, because the goals of an organisation cannot be treated as being entirely independent of those held by individuals within the organisation. Moreover, the results of innovative reforms in education are not always predictable and neither are they necessarily noticeable within a short period of time. Nevertheless, organisations that seek to thrive – to improve and grow – cannot stand still (Handy and Aitken, 1986);

they must accept and promote change as natural and inevitable. A key issue though, which influences the success or failure of initiatives for change, relates to the identity of the change agents and who is perceived as having ownership of the change.

In seeking to improve the quality of educational provision, the education system in the Seychelles has constantly been under review so that appropriate changes can be implemented. However, an underestimation of the role of teachers has been an impediment to change, and this will also have implications for teacher professional development in the future.

The growing concern about quality in education involves changes at fundamental levels, where teacher development can be placed at the centre, in order for lasting educational change to occur. Seeking to improve the quality of primary education in the Seychelles will entail changes in the value system and institutional forms that will affect the manner in which teachers are seen to perform their various roles (Hoyle, 1969).

There is a clear lack of appropriate facilities or structures conducive to continuous teacher professional development in the Seychelles. There are no functional and dynamic teacher associations, no teachers' union, no social clubs, no professional relationships with teacher organisations abroad. Along with the small population and geographical insularity of the country, this institutional vacuum has resulted in a professional isolation that has hampered educational development in several ways. Among the more readily observable traits is the inability, or even unwillingness, of teachers (especially primary school teachers) to participate meaningfully in formal curriculum development. The reasons for this may include a lack of confidence in their own professional expertise, a lack of familiarity with developments in their own subject area(s), as well as in the workings of the various facets of the whole educational organisation. However, their reticence corresponds neatly to a stereotype of teacher as an object of the plans of a central bureaucracy. This is a constraint that raises doubts as to whether training on formal INSET programs will go far enough in enhancing the professional competence of experienced primary school teachers. It is not only the academic education and qualifications of primary school teachers which need upgrading. So does the definition of a who a primary school teacher is, and what they are meant to do.

Training in pedagogy may not be what the majority of these teachers need at the outset, for whatever training is provided will be more productive if it forms part of a wider drive for change. If not, it is quite possible that 'the trainees will simply revert to their old ways the moment they resume work' because the idea of training as a catalyst for change is not necessarily tenable in practice (Commonwealth Secretariat, 1995). Therefore, other types of processes which will enhance the personal/professional and academic development of these teachers will need to precede formal training in pedagogy, since formal training is likely to be more effective if the trainees have an incentive to deploy their new skills and are offered appropriate contexts in which to apply them. So a basic aim of the research and development plan with regard to INSET and school-based teacher development (as complementary aspects of teacher professional development) is to promote processes and school management strategies which are known to enhance variables such as job satisfaction on the part of teachers to boost learning and achievement (both by teachers and students) and to develop supportive school cultures.

The research dimension

Research is a vital adjunct to this plan. So far, studies in the specific area of teacher professional development are unknown in the Seychelles context. It is only recently, with the establishment of an Evaluation and Research Unit in the Ministry of Education, that a serious attempt has been made to formally develop a culture of research in the local educational setting. Moreover, it is through evaluation and with the backing of research findings that the implementation of any teacher education or development programme can be effective monitored and modified as necessary to suit various needs as they arise.

Teachers who attend the Diploma 1 and/or 2 courses at the Seychelles Polytechnic are already required to undertake projects using inquiry-based approaches. The intention behind this and other activities (such as classroom observation, group work or peer appraisal) is to start preparing trainees to be autonomous, innovative, and to initiate action collaboratively for their own professional development throughout their entire teaching career. However, the limited preparation received during formal training is clearly insufficient. This is why it is essential to have additional input and experience by actually engaging teachers in developmental activities in the real teaching–learning environment on an ongoing basis. It is only then that significant findings from parallel research undertaken can be fed back into the processes in order to improve the teachers' professionalism and effectiveness, as a means of achieving the goal of qualitative improvement in the standard of education provided.

DISCUSSION POINT

- Is the training of primary school teachers counter-productive, since the beneficiaries will soon tend to move out of the primary classroom and into other areas of the educational system? Is education run in such a way that the most qualified teachers teach older students?

14 Teachers and the Challenges of the New Professionalism: A Samoan Perspective

Epenesa Lafi Esera

KEY ARGUMENTS

- Problems are encountered in trying to develop a cadre of teachers who are not merely competent practitioners but true professionals. These challenges are addressed under headings which relate to seven areas: collaboration, teamwork, mentoring, professional development, partnership, process orientation and empowerment.
- The 'new professionalism' approach considers that professional and institutional development are irrevocably linked. It is not possible to have one without the other. Promoting good teachers and promoting good schools are intended as components of one concerted policy.

SMALL STATE CONSIDERATIONS

- Teamworking is a vital skill where multifunctional administrators are working in close co-operation with their junior staff or other colleagues. The typical principles of a bureaucratic organisation may thus fail in practice.

The new professionalism

The shift in social tradition which sees reform of teacher education and a different orientation in the culture, values and practices of the teaching profession are very important to what Hargreaves (1994) has described as the 'new professionalism'. This envisages a movement away from the conventional and jealously guarded professional authority of the classroom twoards new types of relationships characterised by more interaction with colleagues, students and parents. The new professionalism attempts to conceive of alternative possibilities, among which is the need to place the classroom – traditionally the exclusive domain of the teacher – within a broader context. In this way, teachers become legitimately more involved in planning, policy formulation and implementation of the achievement of institutional priorities, be they in curriculum design, instructional teaching or student assessment.

In addition, the vision encapsulated in the new professionalism considers schools as challenging scenarios for change. The visible developments taking place in the wider sphere of education and society are expected to have a bearing on the role of the teacher in the classroom. There is, therefore, an added encouragement towards the redirection of perspective and focus and of their effects on the professional growth, independence and self-confidence of teachers.

Central to new professionalism is the fundamental belief in an integration of professional and institutional development. School development without teacher development cannot bring about the desired changes; likewise, teacher development which is not an integrated part of school development will also fail to bring about improved teaching. The two need to co-exist as mutual partners for effective change.

Analysing Seven Strands

This chapter will expand on the main challenges of the new professionalism approach to teachers, especially those just out of teacher training. It does so by considering a number of interrelated intended transformations in the attitude and function of teachers, away from traditional stances. The analysis of each 'strand' will include a brief theoretical component as well as a consideration of its application in the educational system of the Republic of Samoa.

From individualism to collaboration

It is common knowledge that the traditional culture of teaching ensures that the teacher's sanctuary lies within the four walls of a closed classroom. This is the case with the majority of schools in Samoa which have what Lortie (1975) describes as 'an egg-crate-like structure to them: segregated classrooms dividing teachers from one another so they see and understand little of what their colleagues do'. It is by withdrawing into the classroom that the teachers attempt and hope to preserve their autonomy, authority and responsibilities to teaching. Behind closed doors, teachers work out solutions to the problems that confront them without fear of being taken to task.

This orientation shows itself in Samoa in various forms. One is the resistance to the assignment of student teachers to the classrooms of established teachers, on the grounds that this policy constitutes an intrusion into an allegedly private domain. Teachers can easily shut themselves in a mini-world which does not cater for the very aspects of life that education seeks to satisfy. Aspects of curriculum content, teaching methodology and pedagogical know-how are thus likely to remain unchallenged; while good practice remains unshared. Conventional mindsets may be visibly reflected in classroom arrangements with their typical straight rows of desks and with hardly any displays or exhibits except for a few instructional charts pinned up haphazardly. Classrooms may thus hardly reflect what one would expect of an environment that is conducive to learning.

Teachers may have an entrenched fear of betraying weakness which leads to a distrust of other teachers, thereby effectively discouraging professional sharing. In Samoa teachers shy away from working with others in their classrooms or even allowing other colleagues to observe them. Peer teaching and peer coaching is virtually unknown, and unless there is a strong need or pressure to change this is likely to remain so. At the Samoa Teachers' College, the lecturers are involved in peer teaching, mainly in the course of microteaching. For young and new staff, working together in peer teaching is difficult and extremely painful especially when they have never been exposed to it before. However, the benefits are great and the awareness that there are new possibilities to explore becomes real. Little (1988, p. 88) reinforces the idea that 'schools that are discovered to be vital, adaptable institutions have been consistently found to support vigorous professional exchanges among teachers'. He adds that teachers in these schools talk in depth about teaching and about student progress, plan for teaching together, observe one another's work in the classrooms and learn from each other. By praising good work one can steadily build and foster teachers' self-confidence and self-esteem.

A crucial aspect of the teacher development is that teachers are given opportunities to work in pairs where they can observe one another in the classroom. It is not enough to suggest what should be done; a mutually agreed upon definite plan of action mut be implemented. Since so much is happening outside which urgently needs to be incorporated into the classroom, this should enable teachers working together to update their teaching techniques.

In the arena of teacher education, the Samoa Teachers' College encourages and fosters attitudes that allow student teachers eventually to observe their peers and become able to criticise each other constructively and non-threateningly. Classroom teachers, lecturers and student teachers need to see themselves in action, through their own eyes and those of their colleagues. Such a 'peer review' is common practice amongst other professionals, including surgeons, architects and priests, but it appears that, from the moment they receive their certificate, teachers disappear into the classroom to work out their own salvation. This unwillingness to be involved in professional sharing may stem from a misplaced conviction that it would be an admission of incompetence or from a false reading of 'professionalism' as meaning aloofness and mystery.

The need to reassess and evaluate the individual approach is long overdue in Samoa. The very values that have been passed on and perpetuated within classrooms have to a large extent hindered the growth of attitudes and values which education hoped would set learners on a lifelong search for knowledge and enhance individual lives and society. It has also been assumed that teachers' power in the classroom is severely limited due to the hierarchical nature of the school structure, a prescribed curriculum and national examinations, together with the expectations of parents and the public. Yet these latter forces and players have had very little tangible influence on how individual teachers operate in classrooms. In the main, teachers control the way instructional teaching takes place. With the exception of an annual visit from the inspector or the headteacher – for all that this is worth – teachers are very much left to teach as they please.

Many teachers perceive classroom autonomy as the measure of their professional stature. Such isolation, however, fails to contribute positively to professional development. It is this dearth of openness in the classroom culture which the new professionalism tries to address. The literature (Hargreaves and Fullan, 1992; Jones, 1994; Lieberman *et al.*, 1988; Smyth, 1987) argues for a redirection of current practice towards exploring possibilities that offer more collaboration with colleagues. Collegiality also opens up new opportunities for participation in the formulation of educational goals and administrative policies; though, realistically, some concessions have to be made to individual classroom autonomy if teachers are to behave as members of an academic community (Stenhouse, 1975, p. 54). Forfeiting the hitherto iron grip on whatever goes on inside the classroom walls is also clearly distinct from attempts at undermining teacher status via an encroachment of bureaucratic controls (Farrugia, 1988, p. 26).

Paradoxically, although teachers are seen as facilitators of student learning, they lack a network of people who can facilitate their own needs and encourage and engage them in professional learning. Opportunities for participating in restructuring the work environment are ways to break the isolation of teachers and engage them in collective efforts to deal with common problems.

Building collegiality is critical in fostering a more professional culture in schools. This is developed and encouraged by a supportive principal who engages in open communication built on trust. In this way, the principal begins to understand the problems which are shared by teachers and which can be solved collectively. The advantages of pluralism far outweigh the disadvantages; however, in promoting collaborative relationships among those with limited experience in working together, conflicts are bound to arise. Lieberman *et al.* (1988, p. 156) stress that:

> *Collaboration does not come as a natural consequence of working in a school. It must be taught, learned, nurtured and supported until it replaces working privately.*

Fostering and developing collegiality among members of the teaching profession in Samoa is compatible with the cultural norms of society. Many schools continue to be physically located in villages and yet do not form part of them because of the tendency to lean towards an individualistic culture. This virtually cuts off the classroom from the community which is supposed to provide the school with an identity and purpose. Thus, because of the way Samoan society is organised along communal lines, it should be easier for teachers to accept collegiality and its beckoning of a new status. School management should formulate clear policies to encourage more collaborative activities and decision making among teachers.

From hierarchies to teams

Traditional hierarchical structures are not conducive to developing and fostering team work, while horizontal structures encourage a culture of shared professional development. Before the setting up of the Teachers College in 1991, there was a tendency to concentrate responsibilities within the Samoan educational system into the hands of a few people, even when teams may have been seen to be both more appropriate and effective for the tasks at hand, as well as ensuring a stronger commitment with the proposed initiatives. By maintaining a traditional management style, those further down the hierarchy are not nurtured, groomed or invited to support educational goals. The issue of teacher motivation is closely related to how supervision, discipline and sanctions are imposed by the hierarchical system.

Since 1991 there have been attempts to use team effort in the running of the Samoa Teachers' College. Professional issues apart, the relatively high attrition rate of college staff needed to be addressed. At one time, certain courses on offer could not be taught because the expertise was no longer there. Hence, teamwork was considered as a powerful tool for the deployment of priceless human resources.

At the outset, teamwork enabled the staff to be better prepared for the job, to better gauge their strengths and weaknesses, and to make future plans for improvement. Lecturers who were involved in the dialogue and the decision-making process claimed to work more effectively. Teamwork was seen as providing additional motivation and job satisfaction to those who had aspirations to learn and contribute more to the college. A further positive feature of team effort was the development of a sense of ownership in the acceptance of one's contribution by the team. In addition, it provided junior but highly motivated staff with the opportunity to assume responsibilities, while it also allowed the principal to devolve control and delegate. Implicit in this is the role of the principal who is willing to support staff to grow and become effective leaders themselves. As Jones (1994, p. 41) points out:

> *... leaders who dismiss the need for a more democratic approach set their own demise by encouraging uncaring, non-learning organisational cultures, with unethical working and learning practice, which stifle creativity and innovation, leading to poor quality of performance ...*

Moving away from a strict chain of command structure means that leadership and management skills are devolved. At the heart of effective teamwork is the prospect of regulating leadership and being able to accept it. At the Teachers' College, lecturers have now developed a close working relationship which facilitates departmental and sub-committee meetings. However, team effort based on working knowledge of one another's teaching, on observations and discussions of lecturers' teaching and of accepting leadership that targets changes in classroom practices, will need to be institutionalised. It is the very act of teaching under public scrutiny that will in the long run affect the traditional institutional structures. Encouraging teacher leadership and management to regulate leadership and to foster a deep sense of team effort can influence improvements in the curriculum and instruction of the college and schools.

In Samoa, the multifunctional administrator is the usual solution to the problem of coping with the manpower constraints of resourcing an education system. Very rarely do small states have the luxury of being able to recruit at leisure. The pool that the system recruits from is never large enough to satisfy its needs. This imposes an extra obligation on teamworking, since it becomes imperative for such multifunctional administrators to work in close co-operation with their junior staff or those at the same level of the system (Farrugia, 1987, p. 6).

From supervision to mentoring

Mentoring, as opposed to supervision, can provide a higher level of dialogue between the teacher and learner. The arrangement makes it possible for the experienced teacher to support and guide student teachers or new staff. McIntyre (1988, p. 99) suggests that experienced teachers:

> ... *give interns the protection and detailed guidance which they generally need at the early stages ... they can judge how to increase the responsibilities to be given to individual interns both so that they as learners can benefit and so ... contribute.*

In Samoa, it would be useful to assign a mentor to new teachers in their first year for guidance and personal support, especially for those who experience both insecurity and failure. Mentoring can provide a framework within which to engage in discourse on instructional teaching, curriculum changes or student assessment. Mentors can work directly with student teachers and new staff in various ways such as collaborative teaching, observation and feedback; their input towards assessing classroom performance facilitates the personal and professional growth of those under their tutelage.

In this relationship mentors attend to the student teachers or new teachers between their own planning and teaching. They deliberate about preferred practices, and their ongoing interaction is a search to develop and grow in the teaching profession. Hence, the perception of the reshaped school as a site for teacher preparation and as a place for innovation recognises the contribution of mentorship to a changing school culture. The composite result is greater confidence, which in turn facilitates the putting into practice of novel techniques. Mentoring can be accommodated into an educational system in the full knowledge that those involved have much to gain from each other.

In Samoa, mentoring among teachers is difficult in practice, as most teachers are used to a top-down, supervisory role. However, at the Teachers' College, student teachers are encouraged to work closely with their lecturers on all aspects of their work, including the sharing of difficulties. By encouraging students to share their experiences with lecturers and to benefit from their advice and counselling, this should assist in paving the way for developing the mentor relationship.

Still, in Samoa there are experienced teachers who do not take kindly to being questioned by student teachers or by new staff. The hierarchical structures that exist in schools may mean that experienced teachers prefer student teachers to be presented as their 'helpers' or 'apprentices'. This is why the remote preparation of the key people involved in this exercise is crucial. Those who are asked to serve as mentors should be involved in a full discussion and clarification of the programme's objectives.

From in-service training to professional development

Most in-service training (INSET) in Samoa is conducted out of the school and tends to be piecemeal and fragmented, not part of a co-ordinated effort to better serve institutional needs. Moreover, it has been traditionally based on teacher attendance and so, for the most part, workshops and courses have been offered to increase the knowledge and skills of individuals. While one cannot argue against the importance of upgrading staff, there is a vital need to dovetail individual and institutional needs. As professional development is clearly related to growth, the direction it takes should result in effective changes in the school culture and classroom teaching. A better correlation of individual and institutional needs would enhance the prospects of changing current practices. As Hopkins *et al.* (1994, p. 113) write:

> *Powerful strategies that link staff development to school improvement ... need to relate to and enhance ongoing practice in the school ... and link to and strengthen other internal features of the school's organisation.*

Furthermore, there is no effective mechanism through which the outcomes of in-service programmes are assured of incorporation into the school routine. In most cases, therefore, teachers take time off to attend courses and on their return they often revert to the same practices used before they left for INSET. It is this waste of time, manpower and management which the new professionalism seeks to address.

INSET models rest on the assumption that teachers have to be forced into developing and that therefore they need an occasional boost to revive and recharge them. Training then becomes an attempt to fix a presumed deficit in the teachers' professional make-up. On the other hand, professional development poses a different agenda where teachers need to be supported and developed professionally through regular courses that aim at continuous academic and pedagogical improvements to better fulfil the service ideal. Through professional development teachers should become critically aware of factors that affect their practice and prevent them from becoming effective practitioners.

In Samoa, teachers are very much at a basic stage where in-service training provides some form of development for them, but which the majority may not use once they are back in their classrooms. Professional development, on the other hand, attempts to assist teachers to be aware of the need for continuing occupational growth which ensures a continuity and progression in the teaching profession. Such a long-term and continuous assessment view of training needs is yet to be incorporated within the career progression of Samoan teachers.

From liaison to partnership

In Samoa, the link between the Teachers' College and the schools is brittle and fragile. The schools have often raised their dissatisfaction with the way the College places students in schools which is often done without full consultation with the headteacher or the principal. In this procedure, student teachers are placed with supervisors who may not be the most appropriate personnel to take on responsibility for their support and guidance. The College, on the other hand, feels that the students may end up being placed in classrooms with teachers who are on maternity or sick leave. To this end, they work on posting students to supervisors in the different schools and notifying the schools only after it is done. Though the schools might seem accommodating, their administrators are more likely to claim that they are being coerced. There have been cases, especially in the secondary division, where schools have refused to take any students for teaching practice. The problem lies with not having a proper mechanism for encouraging full consultation where both sides are engaged in resolving issues of placement and fulfilment of teaching requirements. Most schools find it not only tedious but frustrating when students are expected to fulfil certain requirements about which the school administrators are left unaware. This lapse or oversight results in conflicting interpretations of college requirements and expectations because supervisors are not involved or informed as to what exactly is entailed. Although forms are sent out for each school's perusal this is inadequate; planning will need to be done to dovetail the interest of the two players towards assisting student teachers to gain the most from their field experience.

A changing perspective leading to full partnership envisages reassessing the roles and responsibilities of the partners involved, and of encouraging both to work towards a redistribution of power which recognises the expertise and experience offered by both. In Samoa this could involve practising experienced teachers contributing more to the development, design and planning of courses for teaching practice. This could be done through eliciting feedback as to how teaching practice courses can be improved. Supervisors could also be asked to offer practical suggestions for the development of teaching practice, as well as being offered opportunities to be trained in taking on any additional responsibilities involved. Often, Teachers' College lecturers have complained about the lack of support from practising teachers towards assisting students professionally to gain confidence and maturity on the job; yet very little effort is made to inform teachers about what is expected of them in their role as supervisors. In a partnership of this nature, student teachers could be encouraged to work with their mentors in sharing skills and techniques.

With any change, there is always the danger that those involved will fear that they will lose control of the situation, but the new professionalism perceives developing partnership as being more beneficial to all concerned parties.

Furthermore, teachers' relationships with parents should be mutually supportive and more open. Establishing closer links between parents and practising teachers should strengthen the teaching profession in their demand for change. While there is the ever- threatening fear of parents dictating the direction schools should take, there is also the very real possibility that parents could become a great political ally for schools to take appropriate matters into their own hands and ask, or push, for changes that could result in greater school effectiveness. I believe that building partnerships between the teacher training institution and schools, and between teachers and parents in Samoa would be of mutual benefit to all stakeholders.

From product to process

It is a sign of the changing times that educational qualifications are increasingly being perceived as opening doors for wider opportunities and better career prospects, status and income. Within this setting, students and parents have always viewed examinations as a difficult but essential phase in the progression towards the attainment of desirable qualifications.

In Samoa, the examination system has made it virtually impossible to concentrate on getting students to experiment, discover and search for meaningful learning. Since the objective is to get as many students into the top schools, teachers – with the full support of parents – have been teaching students how to pass examinations, thereby neglecting the importance of self-learning.

However, parents may fail to understand the implications of their demands for high examination marks. The way in which they align themselves with an educational system that obliges students to pass today and forget tomorrow is an issue that needs to be addressed. This also has repercussions for the training institution that values process much more than exam results. Problems arise when trained student teachers leave the college enthusiastic about getting children to discover and learn for themselves, only to be rudely and quickly reminded that the schools operate differently, and that regurgitation of facts and rote learning of information rules the day.

The relationship between the process and the product is an intricate one, and therefore deciding on the proper balance is far from easy. What is definitely needed is a better match in teaching styles to reflect a balance in the process and product model. Ideally, students go to school to learn, and they still pass exams. One would definitely expect the teaching institution to lead the way in showing that a difference can be made in learning outcomes by assisting pupils to develop their investigative and analytical skills. Learning is not, and should never be, reduced to the passive and uncritical acceptance of facts; rather, pupils should be encouraged to discover ambiguity, uncertainty and the freedom to choose. These should all contribute to the development of mature students who are not only qualified but can demonstrate their command of both knowledge and skills in practice.

From survival to empowerment

In the traditional set up, survival is coping with what Huberman (1993, p. 244) refers to as '... the reality shock in teaching and continuous trial and error, self-absorption, the distance between ideals and the daily realities of the classroom'. When student teachers or new graduates in Samoa are faced with a real life situation in a classroom, the need to control it is simply a survival instinct which is reflected in the pedagogical practices employed. For some young teachers, the fight to survive in an environment which is similar yet different from the culture of the Teachers' College is seen as a challenge which involves them in growth and development; this could prove to be a traumatic experience and the only way to survive is to maintain a distance from their peers and colleagues, while trying to find their feet. Others simply take the line of least resistance and conform to the norm.

It is evident in schools that the urge to survive is so great that teachers, far from trying to change features of the school culture which prove counter-productive to learning, tend to reinforce them via their own practice. For example, teachers are not inclined to use supplementary materials apart from their basic curriculum texts. The majority tend to stick to the prescribed texts and to teach in the way that is outlined, even when they know that this is not helping the majority of pupils. Some teachers also prefer to teach exclusively within the confines of their classroom even when it would be most appropriate and enlightening to have pupils venture outside or beyond. For most, physical education is a non-event because it involves going out of one's classroom, so pupils are cooped up in the classrooms for most of the time. As parents and others believe that learning is hard work, teachers are reluctant to be seen with their pupils playing or dancing, even as part of the school programme.

The new professionalism challenges teachers to change their survival view of schooling into empowerment where they become the agents of change, rather than the unwitting perpetuators of what has been. Since Samoan teachers tend to limit their own scope for development, this then results in an attitude of acceptance, maintenance of the status quo and reticence in the face of established procedures, curriculum initiatives and examination processes.

At the Teachers' College, the lecturers who actively contribute to planning initiatives and guidelines for reform are also more inclined to help and support the implementation of projects targeting change. Where teacher participation is lacking and no proper mechanism is offered to solicit a more collaborative and collegial school culture, then the improvement process will lag behind.

Conclusion

Encouraging and facilitating a culture of empowerment in Samoa is a challenge which could see the education system taking on a fresh and more meaningful look. As things are now, teachers, parents and students all feel that change is needed. A holistic, all-round effort to improve the standing of teachers as professionals can kick-start this badly needed reform process.

DISCUSSION POINT

- **In a school environment where teachers are encouraged to work in isolation, to what would you attribute such tendencies? What could be done to overcome such isolation and promote instead low-risk, collaborative teaching and constructive peer reviews? Is the rampant familiarity typical in small societies likely to facilitate or dampen such collegial practices? Why?**

15

Diagnosing the Failure of a Technical and Vocational Education Initiative in St Kitts-Nevis

John E. White

KEY ARGUMENTS

- An appreciation of the historical and cultural development of St Kitts-Nevis, particularly its long experience of slavery and colonialism, is crucial for understanding the impact and status of technical and vocational education and training (TVET).
- The explicit separation of academic from technical and vocational education is mutually damaging and irrelevant in the context of modern demands for operacy, as well as numeracy and literacy.

SMALL STATE CONSIDERATIONS

- Small states which find themselves the targets of relatively large-scale foreign investments in manufacturing may be disappointed to discover that these investors require hardly any technical skills from their workforce.

- **Foreign investors have a habit of leaving abruptly; their place is then taken by others who may have different skill demands. Such practices amount to dangerous lurches in the economic condition of a small state. They also render difficult the planning of skill outputs expected by industry from the educational system.**
- **A small state society is likely to develop a widespread 'receptor orientation' towards the products of the foreign metropole.**
- **The availability of foreign donors and lending agencies may prejudice the decisions behind the acceptance of new projects in small states.**

The economic context

St Kitts-Nevis has always had a mainly agricultural economy. The islands have very fertile land and sugar plantations continue to dominate the economy. Diversification into other crops in recent years still means that a large number of persons remain attached to the land. If there is to be a perfect match between education and the world of work in St Kitts-Nevis, then schools should have a strong agricultural science component. However, this is not so since the subject is not compulsory and is only allocated three or four sessions per week. Technical and vocational education in St Kitts-Nevis is not sufficiently well geared towards the development of agriculture and its related disciplines.

Meanwhile, both government and the local hotel industry have committed themselves to buying local agricultural produce. Yet due to the very small population only a limited number of people can transform this line of work into a profitable business. A larger number of people cultivate crops in their own backyard, cut down their own food expenses and sell their minimal surplus produce on the market.

This petty agricultural production is a worthwhile exercise for a developing nation trying to cut down on its import bill. It is also a useful security device in the face of those foreign investors who set up 'footloose, screwdriver industries' in small economies (Munbodh, 1987, p. 98). Typically these industries are labour-intensive and require a low skill component – meaning that a very small percentage of their work force requires any technical education. Furthermore, these investors have a habit of leaving abruptly, shifting to locations where they calculate that profitability levels are higher. They may then be replaced by others who have completely different skill demands. These shifts make it very difficult to plan the repertoire of skill outputs expected from the educational system.

A new technical and vocational education project

In 1991, a series of CARICOM Ministers meetings regarding the prevailing economic situation led to a number of recommendations on technical and vocational education and training (TVET). This included the launch of a project which involved the setting up of multipurpose workshops – located in specialised technical and vocational institutions. These workshops were intended to improve integration within the existing educational system, providing nine TVET disciplines to their students.

As will be explained later, after two years serious difficulties could no longer be disregarded. As Chief Education Officer at that time, I diagnosed the situation as having reached crisis proportions and no new intake was announced.

It is against this background that this study seeks to appraise the role of vocational and technical education in small states like St Kitts-Nevis, and particularly to answer the following questions:

- How has the historical and cultural development of St Kitts-Nevis impacted on the development of TVET?
- Does the present educational system and its policies cater effectively for TVET?
- Where and how can multipurpose workshops fit satisfactorily into the educational system, if at all?
- What link should TVET have with the world of work and with economic development generally?

Background

Attempts at setting up technical and vocational education in St Kitts-Nevis go back to 1862, when a technical school took over from a grammar school because it was felt that such an institution would more easily justify its cost. However, this only lasted until 1901 when the grammar school was re-instituted, although the latter kept a strong bias in favour of agriculture.

Technical education was then continued mainly by means of the insertion of metalwork, woodwork and technical drawing within the secondary school system. The onset of comprehensive education in St Kitts-Nevis in the early 1970s saw the added inclusion of home economics and business studies into the curriculum of the country's seven public secondary schools.

In the 1980s, a stronger vocational orientation was deemed appropriate in order to support the country's economic and political aspirations in the wake of independence as a federated state, achieved in 1983. The Technical and Vocational Studies Division of the College for Further Education was mandated to '... provide trained manpower in the necessary skills and disciplines needed to supply the engine of economic and social growth ... catering to both academic and vocational aspirations' (National Education Policy, 1983).

This Division started with a large number of expatriate staff, although indigenisation of posts subsequently proceeded at a rapid pace. The Division oversees student preparation in a number of subjects, including secretarial studies, hotel trades, hotel reception, architectural technology, motor vehicle trades, carpentry and joinery, masonry and trowel trades, air conditioning and refrigeration, electrical engineering, electronics and mechanical engineering. Examinations in such subjects are taken locally or in relation to the Caribbean Examinations Council (CXC) or the UK City and Guilds qualifications. The Division supervises a non-formal youth skills programme which also covers technical and vocational disciplines. So far, this programme has offered courses in electronics, industrial sewing, cooking, hairdressing, data entry operation, casino dealing, electrical wiring, sign painting, tailoring and welding.

Enter the workshops

Into this grand scheme of things was placed the multipurpose workshop, an institution which received international funding offered to all the members of the Organisation of Eastern Caribbean States (OECS), of which St Kitts-Nevis is a member. It consisted of designated workshops, and its curriculum included metalwork, technical drawing, auto-mechanic trades, electricity, masonry, plumbing, home economics and business studies.

These workshops operated as follows: each secondary school was required to send two groups of their second form cohort (13-year olds) to attend the institution for a blocked part of each week. The full programme covered a three-year span. In the first year, students were to pursue all nine disciplines; they were then to pursue their best five disciplines in their second year and their best three in their third and final year. These students continued to pursue a set of core subjects in their own school for the rest of the week. The subjects were to include English, mathematics, science and social studies.

There was certainly a need for an enhanced delivery of vocational and technical education in St Kitts-Nevis. The idea of the workshops was conceptually an appropriate one, and international funding was also made available to help offset the capital costs involved in setting them up. However, these workshops failed.

Diagnosing failure

My understanding is that the failure of the multipurpose workshop is just one symptom of the more pervasive malaise affecting technical and vocational education.

Firstly, meetings were indeed held with the heads of the various secondary schools to brief them about the practical implications of the new multipurpose workshop policy. However, it would have been more appropriate to extend the scope of any consultations beyond the heads of the affected schools. Teachers and members of the community would have benefited from having been involved in the consultation exercise prior to the introduction of the workshops. They would have felt part of the reform, and their input would have enabled them to 'own' the project, while tabling suggestions for improvements in its logistics, and operational and pedagogic features. Instead, they were not part of any initial discussions; they were not aware of the philosophies that guided the whole concept of these workshops; and they were summarily presented with a *fait accompli.*

Secondly, it was not conclusively decided in advance who could or would actually attend these workshops. No decision was taken as to the eligibility of students. The majority of heads of schools ended up picking those students whom they regarded as not having the necessary 'academic' disposition to perform well within a traditional, liberal curriculum. It was felt by these heads of schools that the academically below-average child might become more interested in school if his/her programme of instruction included more practical work. It was also felt that such students would be provided with useful, marketable skills for the world of work, thus providing them with a better opportunity of gaining viable employment after they had left school.

Thirdly, and reinforcing the above, some parents were also asked whether they would like their sons and daughters to attend the workshops. Their response confirmed the prejudiced selection process instituted by the heads of school because the parents of the most academically gifted children were most hostile to the multipurpose workshops idea. They felt that it was certainly not something for bright and able children to consider. By elimination, the multipurpose workshops soon earned for themselves the stigma of catering for low achievers.

Fourthly, the multipurpose workshops also suffered from not having all their details in place by the time they started operation. Certification was a pending issue. Would the workshops provide their own certification? Since the workshops were part of an OECS project, should there be regional certification? The latter was indeed the illusion under which the workshops operated. Furthermore, the implementation process was one which suffered from chronic 'add-on-itis' and 'project-itis', whereby the latest interesting innovation was taken on board without a careful assessment of its strengths or weaknesses, or of how and whether it could be actually integrated with what was already in place (Fullan, 1993). This ramshackle and haphazard approach continued to underline the low status of the workshops initiative, and to further convince the doubters that it was not suitable for their children.

Fifthly, technical teachers have had inferior conditions of employment in St Kitts-Nevis. This again can be traced back to the dominant paradigm of academic certification and to the debasement of relevant experience and technical competence as equivalent, or perhaps better, qualifiers for technical educators. Thus, the self-selection of students to the multipurpose workshops only mirrored the parallel self-selection of staff, and continued to affirm a clear inferiority.

Discussion

How can we properly understand these mishaps in the light of the belief, prevalent throughout the twentieth century, that vocational education was the correct means of promoting national development and that vocational education is the natural bias of any educational pursuit?

Colonisation has enhanced the subordinate status of technical and vocational education with respect to the elite-producing forms of educational systems. This occurred systematically by means of the association of low-status, manual work as a form of punishment for those students who do not excel in academic subjects. Academic education has failed to suggest that persons can lead a satisfying, dignified and productive life unless they have a white-collar job. In fostering such a false sense of aspiration, academic education has also induced contempt for trades, crafts, and manual and agricultural work. To a society with a history of slavery and its associated regime of forced manual labour, vocational and technical education remains too closely associated with culturally pervasive concepts of alienation, powerlessness and social inferiority. Half a century does not seen to have made much of a difference to the basis of the following observation:

> *... the memories of chattel slavery have stamped upon the British West Indian intelligence a strong aversion to, and a contempt for, manual labour. This has coloured the conception of vocational education. It is unfortunate that this attitude has permeated the outlook even of the underprivileged classes who want their children to obtain white-collar jobs.* (Williams, 1994, p. 35)

No wonder that the academic model of education has proved remarkably resilient in many developing states, particularly in the Caribbean. An economic history which included the commercialisation of agriculture for export required manpower armed with the skills of literacy, numeracy and loyalty. The latter was particularly cultivated by means of the production of a local group of 'comprador elites', especially locals holding administrative and supervisory positions, mainly in the public sector. To engender such a sense of loyalty, the elite benefited from a high rate of return on investment in liberal education. This policy ushered in a dual income structure, with a differential rate of return for academic education on the one hand and a technical or practical type of education on the other. This dual structure has been maintained even after independence, thanks to the political influence of local elites. The development strategies pursued by the governments of newly independent states unwittingly exacerbated this trend because of the rapid expansion of the public sector (Bacchus, 1988).

Further reasons may be cited to explain the failure of vocational education. Rapid population growth, rapid urbanisation, rising unemployment and increases in forms of insecure employment suggest that technical and vocational education has been unable to deal with socio-economic problems and may have actually contributed to exacerbate them. Much training has reduced the flexibility necessary to cope with rapid shifts in labour demand typical in small labour markets; while other training efforts have been oriented towards high-tech industrial employment, which then either never materialised or, when it did, only required a few highly skilled personnel.

It should be noted that much of the criticism levelled against technical and vocational education has come from people propounding economic rather than pedagogical arguments. Amongst these, Psacharopoulos (1990) has identified seven principal reasons for the failure of technical and vocational education programmes:

- Most families and children regard it as second best, and as inferior to the academic route. They are thus psychologically and culturally unsuited for manual work.

- The speed of change has meant that it is difficult to adequately prepare students for future uncertain and unpredictable labour market scenarios.
- Forward labour market planning has proved notoriously difficult. This is partly because many of the skills and jobs projected have assumed Western concepts of employment and failed to take into account local cultural dynamics.
- Re-skilling programmes as part of continuous professional development have not been adequately pursued and factored into vocational and technical education programmes.
- The decision to expand vocational and technical education has typically been taken by governments, not by students, parents or employers.
- Teachers are invariably inadequately trained or simply untrained.
- Associated costs are typically at least twice those of 'general' education, because of the need to equip vocational classrooms and because technical teacher education is also more expensive.

Psacharopoulos concludes by arguing that ' ... there is no relationship between the intensity of vocationalisation and the share of the labour force in manual occupations' and further suggests that technical and vocational education is best provided, not at the primary or secondary school level, but rather:

... outside the school system in specialised institutions closely linked to employment needs and changing markets. (Ibid., p. 198)

In the meantime, certain contemporary trends point the way towards a renewed attempt at vocationalising the curricula in such states as St Kitts-Nevis. These trends include:

- Perennial high rates of academic failure at the end of secondary school.
- The void left by the emigration of large numbers of skilled people to 'core, metropolitan heartlands.

- High local youth unemployment and underemployment, especially among secondary school leavers.
- The attraction of international lending agency/donor funding.

A tight link between education and the world of work, in the narrow sense of the latter, would correspond to the concept of human capital theory. According to this, the labour force is conceived in terms of an asset, as a set of human resources intended for the unleashing of their energies and their utilisation as productive industrial assets. I would prefer a different concept, where workers are considered to be inherently resourceful and creative; education would then be intended to contribute towards developing such resourcefulness. This means that some kind of link between education and work must exist; it is the nature of this link which is problematic.

Various academics are now propounding a holistic curriculum which embraces a synthesis of aesthetic, moral, social and vocational influences (Coffey, 1983). The trends reflect the growing blur between what used to be the traditional split, even class and status wise, between white-collar and blue-collar occupations. The high level of unemployment among those with a purely academic background has cast serious doubts on the relevance of such an education to current employment trends; indeed, technology education and its intended outcome – operacy – has today joined numeracy and literacy as key indicators of any successful general educational programme; this incorporation is meeting much less resistance from stakeholders than it used to in the past. Meanwhile, pure technical education is also being replaced by a more comprehensive approach where it is mainly the *style* of teaching which is different; exposure to so-called academic disciplines persists, but the orientation is more inductive, and less iconic, than in traditional grammar schools.

Educators and policy-makers must also guard against the temptation of trying to satisfy short-term, pragmatic demands by industry for 'ready made' employable school leavers. Employability must be secured above employment, especially in shifting markets where 'life-time' employment is increasingly rare and where any set of skills is likely to end up becoming irrelevant and non-marketable during the course of a career. Skill formation, in an academic or vocational or combined manner, must prioritise the ability to search for, digest and accommodate new information; teaching how to learn is the paramount challenge for schools. Industry can then follow this up by a deliberate tooling or re-tooling in relation to specific tasks and duties. In the long run, the task for industry will be made easier, and the return on 'human capital' investment is likely to be both more generous and durable over time.

Conclusion

In the analysis of the condition of the failure of a specific attempt at vocationalisation in St Kitts-Nevis, the historical legacy certainly provides a foundation for understanding the negative attitude that prevails towards certain type of 'work'. It suggests that the separation, in any fashion, of technical and vocational education from general education is a recipe for disaster. Nevertheless, there is enough evidence to show that there is, and must remain, a place for a technical and vocational education component within the educational system of a young developing state such as St Kitts-Nevis. Education must and can orient, rather than prepare, students for the world of work and its challenges, even if this is done in the context of a generalist education.

We cannot underestimate the high expectations that education holds for a large proportion of the population of St Kitts-Nevis. A history of migration, tourism and imports – including TV programmes – from such places as North America raises hopes about the purported effects of schooling and certification, and of how the education system can prove to be the key to clinching 'the good life' at home or, if that fails, by means of emigration (King and Connell, 1999). In a small 'cargo cult' society like St Kitts-Nevis, with its intimate and total encounter and interface with products of the foreign metropole, it is not just an elite who have such ambitions, but the large majority of the population. Will any educational system at home manage to provide anything except recurrent frustration?

Perhaps we can learn from past mistakes. The best way of safeguarding the country's social and economic development appears to include the formulation of a curriculum which promotes a better balance between the logical-mathematical and linguistic, between the musical, spatial, kinaesthetic, interpersonal and intrapersonal abilities (Forde, 1991). Perhaps there will be a need to distinguish but not discriminate between academic, vocational and technical education. The allegedly 'second class' status of technical educators must be removed and their proper integration into the mainstream educator class negotiated, following talks with the teacher's trade union(s). I would tend to support the argument that vocational training given in relation to real job apprenticeships, in-service and on-the-job training makes obvious and practical sense. This is especially so in a small country where it may prove quite impossible for the state to duplicate the state-of-the-art machinery and equipment that is in place in the private sector; and where wholesale training in specific skills may never be applied in the actual job market (Smawfield, 1993).

DISCUSSION POINTS

- **How possible is it in practice to infuse technology education into a largely generalist curriculum? What challenges would such a strategy pose to: assessment procedures, pedagogical styles, recruitment and training of teachers, and reactions by parents, students and other stakeholders?**
- **How likely is it that a major education project could materialise not because there is any real or felt need for it, but because a funding agency has shown its willingness to support it?**

16 Partnership between Technical Education and the Business Community in the Seychelles

Jean André Alcindor

KEY ARGUMENTS

- The emergence of a felt need to develop an 'education–business partnership' for vocational education and technical training (VETT) may stem mainly from political considerations (a public policy shift in favour of privatisation) and economic ones (an urgency to diversify fiscal dependence of vocational education away from the state). There are, however, sound educational reasons why such a partnership should be promoted.
- Implementation is recommended on the basis of a modularisation of the VETT curriculum, driven by the twin goals of learner competence and industrial relevance.

SMALL STATE CONSIDERATIONS

- Vocational education in many small states tends to suffer from a subordinate, 'second class' status in relation to liberal education – a cultural condition and mindset not easily dislodged.

- **Generalist VETT should be pursued up to the end of secondary school and specialisation only encouraged beyond the post-secondary level.**
- **The availability of suitable partners in VETT in the private sector may be severely limited because of the small size and absence of diversity in the domestic micro-economy.**

The challenge ahead

Small island developing states increasingly need to evolve and develop their systems of technical education and training as an integral component of their development into a modern state. Hence, it is the belief of many policy-makers and educational planners that vocational education and technical training (VETT) must spearhead the rapid economic development of their countries, thanks to its contribution towards actual and potential man-power needs.

The critical analysis of the efficiency and effectiveness of the current approach for the implementation of VETT in the context of the transition from somewhat centrally planned economic management to a free market economy reveals that many small states come face to face with a number of constraints and drawbacks arising both within and outside the educational organisations.

Cognisant of this vision and its challenges, this chapter sheds light on the external challenges that policy-makers and educational planners in the small island state of the Seychelles have had to face when implementing VETT. It then goes on to advocate the virtues of an 'education–business partnership' as an appropriate pedagogic system for increasing the efficiency and effectiveness of VETT, in spite of various constraints, some of which are associated with the 'ecology' of small size.

The Seychelles is classified as a high middle-income economy. A population of 80,410 enjoyed an estimated GDP per capita of US$7,346 in 1999. The manufacturing sector remains underdeveloped, due particularly to limitations on import substitution, diseconomies of scale and inability to influence local prices. The export of traditional cash crops such as vanilla, nutmeg, cinnamon and coconut has declined drastically because of depressed world prices. The tuna industry, which is largely untapped, is the main source of the country's foreign earnings, derived from a huge 1.2 million km^2 exclusive economic zone. The tourism industry also predominates; but product quality is reportedly on the decline, tourism revenues have fallen, aid levels are declining and a budget deficit close to 11 per cent of GDP has been registered. These disquieting trends have prompted a development strategy within which the private sector is expected to play a greater role in the economy. The country has thus been undergoing a steady process of liberalisation and privatisation since the mid-1990s.

Atchoarena (1993) is typical of authors who argue that most small countries can ill afford to marginalise their technical and vocational training in the context of meeting the country's manpower needs. However, there are few specific strategies for developing technical and vocational training in small states. In this context, one fundamental task of educational planners in Seychelles has been the search for a relevant pedagogic system for the implementation of VETT that would suit and respond to local conditions. Given that industries and employers from both governmental organisations and the private sector are amongst the main beneficiaries of and stakeholders in VETT, their active participation in planning, implementing and evaluating training was deemed vital and was sought straightaway. Any such involvement must, however, be appraised in relation to the difficulties and constraints faced in implementing a viable, attractive and efficient VETT system.

During major educational reforms in 1978, 1991 and 1999, the Seychelles Government embarked on vigorous plans and formulated new training policies for the revitalisation of technical education. However, despite all these efforts, the country is still facing a number of handicaps such as a poor economic infrastructure, an underdeveloped industrial base, small and micro-firms, a poor manpower base and a lack of co-ordination between the newly emerging vocational training institutions.

Some of the external reasons for the relative failure of VETT are attributed to the policy prediction that Seychellois students would be naturally attracted to technical courses since these would stimulate their motivation and interest. This expectation has generally not been fulfilled. The status accorded to liberal education, even if it is less relevant, is powerful and is fuelled by the local middle classes who see such education as an important passport to administrative jobs, the professions and possibly international mobility. It has not been enough for the state and its institutions to initiate a campaign during the 1980s lauding the allegedly higher status attributable to manual work and emphasising the more direct contribution that VETT can make to the economic development of the newly independent nation. The setting up of educational institutions to meet the overriding philosophy of the policy-makers, particularly the setting up of the Seychelles Polytechnic, did not, in itself, generate the expected strong demand for VETT provision.

Research into vocational education and training by authors such as Sultana (1992), Lauglo and Lillis (1988), Bacchus (1988) and Psacharopoulos (1987) consistently indicates that a number of causes for the failure of a VETT policy are internal to the school system. The Seychelles is no exception here since, as is the case in various other small states, it has met with real difficulties in locating and recruiting staff who are both good craftsmen and good instructors. Furthermore, vocational schools have been hard pressed to generate enough capital to provide adequate material resources such as the latest equipment and tools. With an insignificant domestic industrial base and no industrial tradition to call upon, the potential private sector patrons and sponsors who exist in other, larger, countries are simply non-existent in the Seychelles. As a result, the least motivated and least achieving students, as well as the least qualified staff, ended up being assigned to poorly resourced vocational schools. This is a most unfortunate combination which has also occurred in other countries. It is a certain recipe for failure, since the experience will only convince and reinforce a general and popular conviction that VETT is only a 'second best' option for second-class citizens.

In the meantime, educational policy-makers and planners in the Seychelles have also tried to address a number of other drawbacks. These include: a glaring mis-match between supply and demand in the labour market; the youth and lack of occupational experience of the job-seekers, an inadequate institutional framework, inappropriate curricula and approaches to learning; as well as inadequate financial provision for training. The key policy debate concerns the 'weighting' between state and civil society in the running of VETT.

Atchoarena (1993) maintains that the issue of whether training should be provided by the state, by private institutions or by enterprises arises in small countries on very special terms. The author pinpoints the challenges that may render industrial training in a small state futile. The small size of the private enterprise sector makes it difficult for it to be involved directly in training. The economic fabric is unable to absorb a large number of apprentices, and usually it does not have the equipment and skills required to provide the training required, especially if it is technologically sophisticated, specialised or capital intensive. Thus the state is, in most cases, forced to become directly involved, either by organising technical and vocational training streams within the education systems, or by creating a separate training centre. Typically, only few economic sub-sectors within a micro-economy are sufficiently developed and structured to realistically assume any responsibility for training. The obverse issue is that, for broadly similar reasons, private concerns have little interest in training, and expect *a priori* that the state will assume full responsibility for its provision. Furthermore, aid from international sources is typically either of a capital, 'one-off' nature that does not facilitate recurrent expenditure, or else does not include state of the art technology. Financing is therefore reduced to two variables: public funding and possible contributions by the beneficiaries in the form of enrolment and course fees. Seychellois institutions which currently reaffirm such a notion of stakeholder investment, in which industry and the business community have a minor role to play in the training of vocational and technical students, include the Seychelles Polytechnic, the Industrial Training Centre (through its in-service course and competency-based programs), the Centre For Health Studies, the Seychelles Hospitality Tourism Training College, and the recently established Farmers' Training Centre and Maritime Training Centre.

An emerging paradox in the search for a relevant pedagogic system for VETT emphasises that a generalist education is the best form of vocational education. The dominant philosophy of education does not stress the acquisition of specialised occupational skills but the development of basic but flexible social-technical competence. This policy is indicated as especially suited to small states and their small labour markets, which must somehow respond to typically erratic shifts in supply and demand. In such a scenario, specialised vocational education is left till post-compulsory school age and schools can focus on doing what they do best, namely teaching general skills in close step – though not too close – with industry. The proximity debate is a pertinent one, since schools and teachers are apprehensive about industry assuming a position of authority and dictating school curricula and transforming education into induction programmes. However, the correct degree of close co-operation with industry should ensure that the training is not outdated but rather follows closely any technological developments in the relevant fields. Meanwhile, part-time work placements in a particular industry, especially through apprenticeship schemes, will reduce the opportunity costs of postponed employment for students and allow them to master the crucial basic experience which will serve them in good stead once they find themselves on the job market. Such opportunities must, however, be seen in a context where technological sophistication may be totally absent. The Seychelles is a case in point: what degree of high-tech relevance can be expected from a manufacturing industry whose major firm is a local brewery employing around 100 workers?

Perhaps one critical advantage of VETT is that, unlike liberal or general education, it requires a constant and dynamic link with industry. It cannot escape into an ivory tower stance since its 'product' will be under continuous scrutiny by discerning investors, employers, managers and businesspeople. Munbodh (1987) suggests that cases of failure in VETT are often attributable to an inability to establish a suitable link with industry; while success stories demonstrate a symbiotic relationship, as in the case of the Lycée Polytechnique and the Industrial Vocational Training Board (I.V.T.B.) in Mauritius, which the author of this chapter has visited. Such ongoing links enable the VETT institution to grow in harmony with the business community it serves and this, in turn, enhances the image and relevance of technical education.

The problematic involvement of industry for successful VETT was highlighted as early as 1976 when the Commonwealth Pacific Regional Seminar/Workshop on 'Education and the Community: Partnership for Development' was organised by the Commonwealth Secretariat in response to growing concern to find ways in which education programmes could be tied more closely and strategically to the goals of national development. Particular attention was given to the business community's participation in education, to ways of adapting educational programmes in response to present and future needs, to out-of-school education and to changes in agriculture and industry to absorb school leavers. To strengthen the business and industrial community's participation in education, certain requirements were seen to be necessary: the public must be aware of national goals, philosophy and plans; present education systems needed to be examined and integrated within national goals and plans; new approaches and systems of education must factor in business community participation from the initial stages; strategies were required to ensure that educational administrators and planners are consistently aware that business community participation is an integral part of the school processes.

Over the past years, various employers, and even a number of educators, in the Seychelles have emphasised the need to shift from the traditional approach where the polytechnic schools and the then Ministry of Education and Culture worked in isolation in the process of implementing VETT policies. In an effort to establish a more effective approach, in 1996 the theme for the annual Careers Week was 'Education–Business Partnership' which sought to establish or reinforce linkages between education/training and the world of work. In September 1997, a national conference on school improvement was organised by the then Ministry of Education and Culture with the theme 'the working together school', the main issue being an exploration of the possible relationship between a school and the business community. A recent conference held in June 2001 was on secondary education, entitled 'Challenges of the 21st Century'. According to the present Ministry of Education and Youth, there is a need to refocus on the

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quality of secondary education and to confront the challenges we face in future development of secondary schools and post-secondary institutions.

Establishing shared responsibility is a difficult and ongoing project. Still, it is possible to identify the key steps that need to be taken in order to dynamise the participation of the industry and business community as partners in the implementation of national vocational education. Firstly, all parties concerned have to explore areas of mutual interest after the operating environment of the school concerned has been established and the receptiveness of the institution as a whole to the idea of working with industry. Secondly, senior management need to provide support for the initiative so that all parties contribute in drafting an action plan. It is essential, therefore, in order to transform the intention to work with industry into concrete action, that a group of individuals largely acceptable to all stakeholders is assembled, who will be able to take the initiative further. Foskett (1992) recommends that such a group should be drawn from a broad constituency, involving all those who have a say in developing the requisite links, especially representatives from industry.

Presently, structured linkages between the training centres and local industry are in force through the establishment and operation of training advisory boards, apprenticeship schemes, work attachment programmes and in-service courses for employees in the public and private sectors, NGOs and parastatal (quasi-public) entities. However, prior to the decentralisation of training, time and effort were not properly invested in the care and nurturing of these consultative committees of the Seychelles Polytechnic, as Roberts and Lesperance (1995) maintain. Although the policy governing the establishment of the consultative committees was put in place in 1984, many difficulties continued to surface. Some technical schools of the Polytechnic had at best an ineffective committee that met once a year because it was required to do so. Even then, the focus of the annual meeting was often restricted to problems with and within the school. Hence, the meetings appeared to focus on issues which were not of any major concern to anyone other than non-educators or school administrators, and which were especially irrelevant to business people to whom time is money. Other school committees managed a better, more productive input, but they still experienced difficulty in maintaining an adequate and broad representation at meetings.

To establish an appropriate institutional framework between the Technical Training Institutions and the wider community, an assessment of the difficulties often experienced by local and national institutions serving small population based societies needs to be conducted.

Firstly, at the national level, inadequate institutional arrangements stem from a lack of manpower qualified to implement skills development programmes within the responsible ministry (in this case, the Ministry of Employment and Social Affairs). The Centre for Skills Development, which was a unit of this Ministry, died in its infancy because it was unable to fully monitor the pertinent training issues in the country.

Secondly, policy remains largely haphazard and in desperate need of some anchoring structure and guidelines. According to an ILO/EAMAT Advisory Mission, 'there is a need for a Vocational Training Act which will provide a framework for the development of comprehensive policies, schedules for VETT and a strategic implementation reflecting present and future development needs of the country' (ILO, 1995, p.19). The mission also recommended that for training to be relevant and efficient it must be conceived and delivered with a framework of useful instruments and institutions. Social partners, especially stakholders such as employers, should be involved in management and, ideally, funding. The system should be flexible enough to ensure efficiency in delivery and to meet the demands of the labour market. Also, for maximum effect, decision-making should be decentralised in order to respond to training needs and minor problems whenever they arise (ibid., p. 22).

Thirdly, it must be remembered that, echoing Packer (1993), small states and their typically multifunctional bureaucrats find the planning and management of external linkages to be a perennial challenge (Farrugia and Attard, 1989). Much of this difficulty has to do with poor communication channels, the lack of skills in designing projects, uncertainty in engaging in negotiations with other interested parties who are market driven, and the sheer amount of time needed to build and cultivate positive external relationships in the context of bureaucratic structures.

Hence, the establishment of an appropriate institutional framework between the technical training centres and the wider business community would allow both parties to be involved in strengthening their respective organisations in terms of developing appropriate training programmes, establishing training levy/grant schemes, trade testing and certification. Such initiatives are of common interest to both parties, and provide a useful common ground which could foster collaborative efforts. These programmes could be implemented while the partners concerned are also offered training and familiarisation with new training strategies.

Having explored the benefits of establishing an institutional framework between the technical training centres and the community, it is important to throw light on a particular training methodology which might bestow greater flexibility to the implementation of VETT in Seychelles. Traditionally, the methods of training adopted by some technical schools reflect the didactic, teacher-driven style of delivering instruction, which in many cases fails to develop competencies and the acquisition of marketable skills by the learners. Consequently, frustrated employers often complain that those who graduate from VETT institutions lack not just the knowledge and skills, but also the disposition required to perform well in a competitive business environment. Certainly, a larger degree of flexibility, creativity and problem ownership, along with other soft, people-oriented skills such as effective leadership, group working and communication, are generally lacking and only acquired through VETT incidentally.

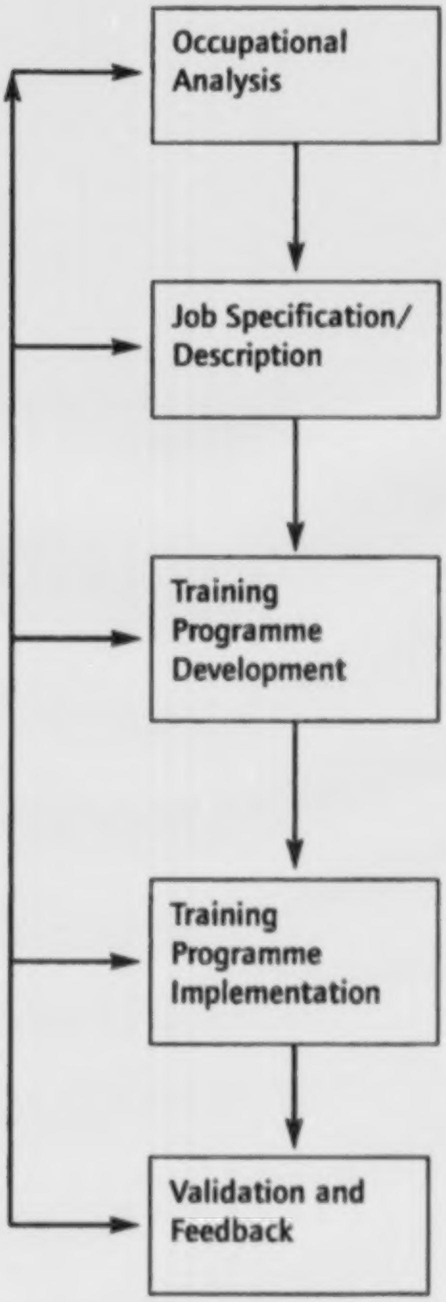
Apart from the limitations characterising the present forms of training methodologies and schemes in Seychelles that are seen as being linear, continuous, rigid and cumbersome, Atchoarena (1993) recommends the modularisation of training as a more suitable approach. The principle of modularisation consists in decomposing training into a set of distinct but connected sequences, each one corresponding to a specific objective of vocational skill acquisition. However, in all fairness, continues Atchoarena, its implementation is relatively complex and requires a number of minimum conditions to be met. The first stage in the construction of modular training consists in drawing up a precise inventory of the skills required for each job. One current approach to doing this is to adopt the occupational analysis technique in which stakeholders, employers, technical staff, parents, businessmen, curriculum designers and mature students conduct a thorough analysis of various occupations for the identification of the required competences and thereafter the requisite components as training content. Figure 16.1 shows such an integrated training system, proposed by the ILO Advisory Mission for implementation in Seychelles. Figure 16.2 shows an approach for the development of a competency-based training programme developed by Blank (1982). Approaches of both these kinds need to remain open to possible modification during the gradual curriculum design process.

Modularisation also affects the system of certification. However, given that such a set-up conjures up so much more flexibility, is learner rather than teacher driven and is more locally responsive, these attributes collectively imply that wastage of time and effort on irrelevant topics is minimised and expenditure on unnecessary resource requirements is avoided.

To the small vocational education systems in small states, such an approach would certainly be welcomed as being more effective in many ways. Such an approach is more likely to dissuade policy-makers from the wholesale import or transplant of curricula borrowed or uplifted from abroad, typically from larger, metropolitan states. It would also help to avoid the tempting technocratic solution to curriculum design, which suggests leaving the job to the educational experts, with minimal involvement from anyone who is not qualified. This departure from an obviously elitist perspective would boost the status of different kinds of non-symbolic knowledge and expertise. Employers should, therefore, be expected to give their support willingly to the development and implementation of modules required by their firms as and when necessary.

As a concluding remark, given the necessity for a new relationship to be established between education, industry and the community as a whole, UNESCO recommends that 'technical and vocational education should exist as part of a system of lifelong learning adapted to the needs of each particular country' (UNESCO 2001).

Figure 16.1: Integrated Training Programme


Occupational Analysis
Job Specification/ Description
Training Programme Development
Training Programme Implementation
Validation and Feedback

To determine:
- Workforce composition
- Number of workers
- Facilities available and/or needed for training

To establish:
- Accurate job description
- Task and task elements
- Skills and knowledge needed
- Performance standard

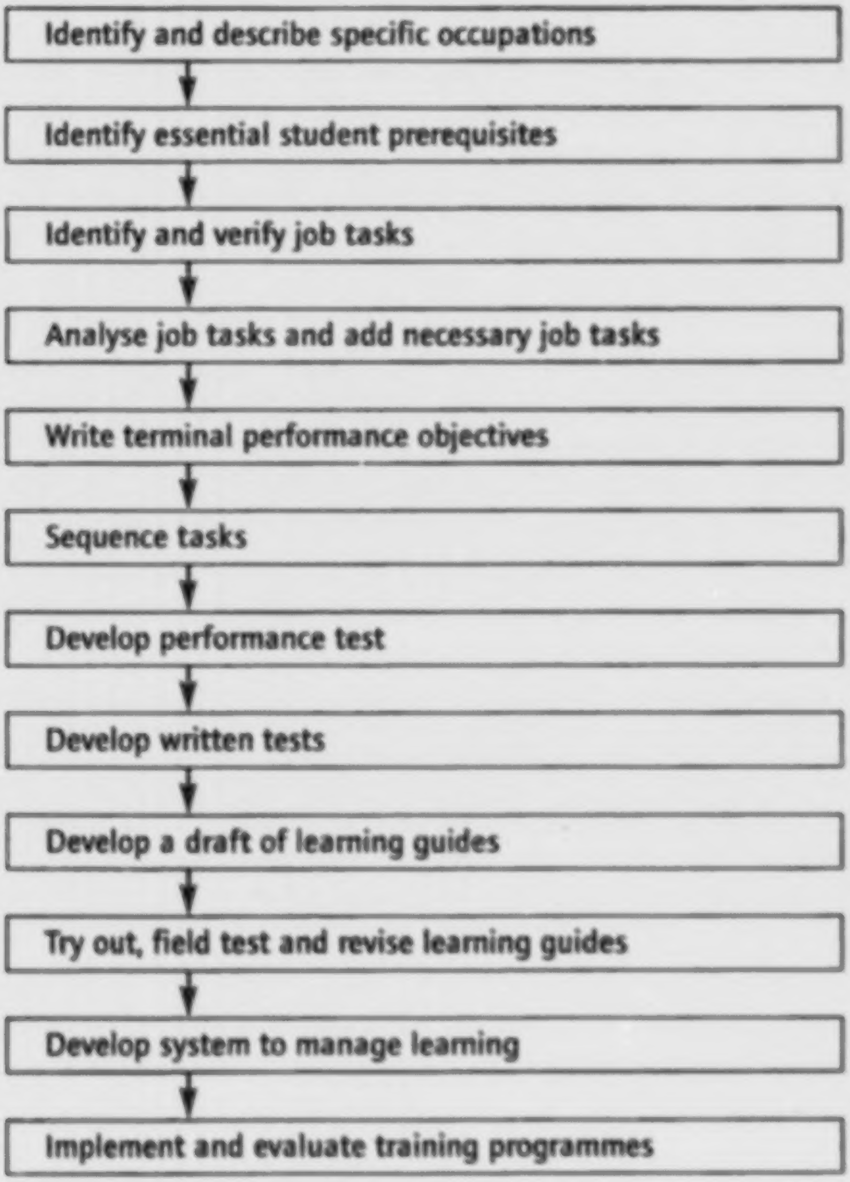
To develop:
- Selection of methods in-plant and in centre training
- Research & Development

To ensure:
- Planning
- Provision
- Learning stations

To maintain:
- Measurements of effectiveness/efficiency
- Trainee follow-up
- Feedback communications industry-government

Source: ILO (1950)

Figure 16.2: Twelve Tasks Required to Develop a Competency-based Training Programme


Identify and describe specific occupations
Identify essential student prerequisites
Identify and verify job tasks
Analyse job tasks and add necessary job tasks
Write terminal performance objectives
Sequence tasks
Develop performance test
Develop written tests
Develop a draft of learning guides
Try out, field test and revise learning guides
Develop system to manage learning
Implement and evaluate training programmes

Source: Blank (1992)

DISCUSSION POINTS

- Given the impacts of globalisation and 'westernisation of training philosophy' on the search for relevant training paradigms and systems by the small states, what are the interventions and strategies for the reengineering of VETT in small states?
- Should policy-makers continue to rely on curriculum innovations and research from their past colonial masters?
- Should we increase synergy by integrating regionally and internationally with our colleagues from other small states in the search for relevant training models?
- If VETT were to be privatised completely, how prepared is the private sector?

17

Reforming Culture? A Change Management Proposal for the Educational System in Antigua and Barbuda

Lesroy Alstyn Merchant

KEY ARGUMENTS

- The culture and organisation of a Ministry of Education as well as that of individual schools may contribute to low staff morale and student disillusion with the value of education.
- A Ministry of Education run on strictly bureaucratic lines may not be an effective instrument to respond quickly to specific demands from 'clients' – including requests from specific schools.
- Change Management is problematic: the involvement and co-operation of those directly affected by any contemplated change should be enlisted from the outset if any such change programme is to avoid defensive resistance and enjoy any chances of success.

SMALL STATE CONSIDERATIONS

- A specialised national unit may take up the time and energy of one, or even less than one, person.
- Introducing client-driven units within a state bureaucracy often boils down to ensuring the right reporting relationship between two individuals.
- Lobbying for change in a small state is idiosyncratic, since those whose support is crucial for the requisite change are easily known, accosted and spoken to.
- A bureaucratic structure predicated on impersonality will find it very hard to survive unscathed in a small-scale environment where personalisation and person specificity is the norm.

Profile of the problem

Over the last two decades a number of serious problems have emerged in the education system of Antigua and Barbuda, especially at the primary and secondary levels. It is no exaggeration to claim that a crisis exists in the country's primary and secondary education sectors. Even a cursory inspection of the physical and academic infrastructure will furnish proof of the foregoing statement. No less than 50 per cent of secondary and about 30 per cent of primary schools are in urgent need of upgrading and are filled beyond capacity. In most of the primary and secondary schools, there is a severe shortage of proper facilities, such as desks, chairs, modern teaching aids and modern teaching equipment such as computers. Critical support facilities such as libraries and laboratories are highly inadequate.

Based on my own personal observations as the head of a secondary school, as well as on information received from other heads and ministry officials, it has become evident that serious challenges face both the teaching staff and the student body. The majority of teachers claim they are suffering from frustration and high levels of stress. They explain that they lack motivation and are just going through the motions of their work. As if to confirm this low morale, their punctuality and regularity at their place of work is low and the incidence of moonlighting high. Highly qualified teachers, mostly males, are leaving the profession, while the need for training and retraining among the remaining teachers is great. As for the student body, many students have lost the urge to do well at school and to study; apparently school is no longer a priority for them. The general state of order and discipline among students also leaves much to be desired. This is not a surprising outcome, given the low morale of their teachers.

Academic standards, as would be expected under these dire circumstances, are low. Indeed, it is estimated that no more than 40 per cent of the students who pass the 11-plus examinations can cope with the Caribbean Examinations Council (CXC) syllabus; while no more than 10 per cent of those who enter through the post-primary stream can do so because of the poor numeracy and literacy skills of the large majority. Between 1990 and 1994, the average number of students passing four or more subjects at one sitting which would qualify them to enter the job market or pursue higher studies was only 23.2 per cent; on the other hand, an average of 25.5 per cent failed to pass even in one single CXC subject.

Gordon George, a local educator and statistician, conducted a literacy survey in 1993 based on a sample of 2.6 per cent of the population of Antigua and Barbuda. The results of this study revealed an alarming illiteracy rate of over 13 per cent amongst the 15–19 age cohort, rising to over 60 per cent among those over 50 years of age (George, 1993).

Rationale

The crisis at both the primary and secondary level of education in Antigua and Barbuda has serious implications for the island state's development. Being a small state with a very limited physical resource base and no commercially exploitable raw materials, the country depends almost exclusively on its human resources for its development. The role of education as a vanguard economic element cannot, therefore, be overemphasised.

Choksi (1995) has sought to explain why Pakistan and South Korea had a similar gross domestic product (GDP) per capita in 1960; however, by

1985, South Korea's GDP per capita was nearly three times that of Pakistan. What had South Korea done differently? The key difference was educational investment; South Korea had invested three times as much in its human capital formation. It is crucial for small resource-poor states like Antigua and Barbuda to follow the South Korean example without hesitation.

The crisis can be viewed in a wider context; it is in part a phenomenon peculiar to small states in their post-independence period, as they struggle with a relative paucity of resources to meet the quantitative and qualitative increase in demand for education by their population. The demands for more and better education are both intensive and extensive; they relate to the drive to stamp out illiteracy and provide basic compulsory education for all, as well as to gear tomorrow's labour force to the technological and intellectual challenges required in the demanding, skill-driven, job market.

As a major 'stakeholder' in education, being an educator of some 31 years standing and the father of school-age children, I have accepted 'ownership' of these problems and have decided to try to understand their causes, with a view to being better equipped and prepared to consider viable solutions. I intend to provide an overview of the administrative/management system in force in education in Antigua and Barbuda, explaining how this system contributes to the current adverse state of affairs, and then to advance solutions to assist in reversing the present situation. I narrow my focus to the administrative/management system not because it is the only source of the current problem – inadequate financing is another issue – but because some of the most serious problems facing the primary and secondary schools can be attributed, in no small measure, to a lack of proper management structures and procedures. After all, echoing Barrett (1992, p. 257), research has shown that structural change is needed in order to evoke positive responses in employee attitudes and behaviour and to achieve the highest level of efficiency.

Administrative and management structure of the Ministry of Education

The education system in Antigua and Barbuda is highly centralised, so management at the centre (the Ministry) will, to a very significant degree, determine management at the periphery (the school). The country's management of its educational system was basically inherited from the British who introduced it in Antigua and Barbuda in the latter half of the nineteenth century. As such the system is a classical example of a bureaucracy, where different positions are filled by technical or clerical specialists with narrow but complementary job descriptions. The six key characteristics of this 'legal-rational' type of organisation (Weber, 1968) are as follows:

- A division of labour based on functional specialisation;
- A well defined hierarchy of authority;
- A system of rules covering the right and duties of employees;
- A system of procedures for dealing with work situations;
- Impersonality of interpersonal relations;
- Promotion and selection based on technical competence.

(after Dubrin, 1981, Chapter 8)

The first three features of the system tend to make it highly bureaucratic; hence education administrators have to go through much 'red tape' before they can get things done or approved by the Ministry. Instead of assisting in solving problems at the school level, this procedure easily results in exacerbating, if not itself creating, additional problems. For instance, a Head of School might apply to the Ministry to get minor repairs done to his/her school's classroom doors; by the time the Ministry responds to the request, his/her school will be in need of new classroom doors.

Such inbuilt features can render the decision-making system so inflexible that it seems that obeying rules becomes an end in itself. Put differently, the system is not geared to respond effectively to market or client needs, but is primarily and consistently loyal to its own internal efficiency. Since one of the main features of the system is the impersonality of the interpersonal relations in a culture where close interpersonal relationships are the norm, it serves to alienate and even to antagonise key players in the education sector such as teachers. Little constructive reform has been attempted to this structure; no significant attempt has been made to render the structure more responsive to needs at school level.

There remains, of course, scope for modern, bureaucratic organisations, especially where there are demands for clear job demarcations, fairness, accountability and internal controls. However, such structures need not exist to the exclusion of more dynamic units. The pioneering research of Burns and Stalker (1961) suggests that a 'just-in-case' bureaucracy may be suited to administer routine and fairly predictable operations; but a 'just-in-time' set-up is more appropriate to respond quickly and flexibly to a variety of client needs. Consider, for example, the vital role that a planning and curriculum unit has performed in a country like Singapore:

> *In addition to its role in the planning of policies and development of programmes, improving the information system and devising innovative feedback mechanisms, it had the function in implementing any new programmes which were developed and initiated improvements ...* [The Unit] *paved the way for continued improvement in the teaching learning process through the provision of quality curriculum packages which included course books for pupils and teacher handbooks, audio visual materials like slides, charts, 3-dimensional teaching aids, games and even multimedia kits.* (Nazareth, 1995, p. 9)

Such units in small states will obviously be very small. In Antigua and Barbuda, they are likely to comprise one, or even just part of one, official. Nevertheless, if allowed to operate at arm's length from the core bureaucracy, they can deliver, while restoring some precious legitimacy to the whole management system. In practice, since we are talking very small numbers and discrete persons here, it would boil down to Mr A deciding on how to update and liaise with Ms B.

A planning unit within the Ministry of Education in Antigua and Barbuda would be much better placed to deal with the current crisis and to anticipate and avoid future ones. Such a unit could also conduct, supervise or subcontract research into the conditions which are resulting in low motivation among students. The results of such research could provide teachers with a better understanding of the variables affecting their students and so put them in a better position to devise more successful motivational strategies.

A similar set-up could be conceived for a local curriculum unit. Its brief would be to regularly monitor and evaluate curriculum content, pedagogy and examinations. From this position, such a unit would be well placed to recommend specific curriculum content, teaching methods and resources that would bring about desired educational outcomes.

Ministry's administrative/ management culture

The culture in this system does not readily permit the Ministry's personnel to develop or exercise the kind of innovative skills and collegial attitude which are required in this situation. Indeed, it would be naïve to expect the simple setting up of semi-autonomous units to solve the problem. They are more likely to fall victim to the dominant organisational culture and therefore stop short of the dynamism and flexibility which is their intended *raison d'être*. This dominant culture is characterised by:

- Conformity to routine
- Individualism
- Competitiveness.

The Ministry's personnel then, because of the prevailing culture in which they operate, are not inclined to be innovative and creative. The system could effectively chide or punish them for entertaining any 'departures'. Charles Farrugia's observations about civil servants in Malta also holds true for the Ministry of Education's personnel in Antgua and Barbuda:

> *Maltese public servants were trained within a tradition that encouraged deference to past, well tried routines and within a culture that discouraged innovation unless sanctioned from above.* (Farrugia, 1993, pp. 160–1)

Given the type of problems being faced by schools, Ministry officials need to consider departing from the safe and snug traditional routinised approach to problem solving and come up with one that is driven much more by grass roots concerns, from the front line where education matters most. But how can a highly individualistic and competitive culture provide any of the answers that schools are looking for? The current situation would not reward non-standard responses; it would rather give rise to 'buck-passing' and isolated individual attempts being made to 'deal' with the situation, while the threat of change would put the Ministry staff in defence mode. It is not enough to try and persuade Ministry officials to accept joint ownership of this crisis and in a collegial and collaborative manner apply their skills, abilities and energies towards a solution.

The Ministry's mode of operation

An examination of the Ministry's mode of operation sheds light on the reasons why the country's schools, staff and students have been in such a precarious position. Such a review has involved appraising how the Ministry of Education (a) communicates; (b) drafts policy; (c) resources schools; and (d) ensures school development.

(a) Generally, the Ministry engages in a didactic monologue with the schools. All strategies, ideas, views and reflections flow down authoritatively from the Ministry to the schools, and no real allowance is made for any attempt to establish a communication flow in the other direction. This is why a regional Education Reform Working Group (ERWG) called for: '... constant dialogue, communication and consultation between all stakeholders' (ERWG, 1991, p. 89).

Such 'constant dialogue' and 'consultation' between all stakeholders are critical for any meaningful approach to find solutions to the many pressing problems besetting the schools. Bezzina (1988, p. 76) makes a similar point:

> *the effective social organisation is characterised by supportive reaction, mutual respect, confidence and trust and a substantial system of interaction and influence among members and between members and leaders.*

(b) In much the same way as its communication procedures, the Ministry of Education's policy-making is patently one-sided. In Antigua and Barbuda, as in so many former British colonies, the 'policy-making community' that Fenech (1994, p. 138) identifies is a very small and exclusive one that carries out its function in an undisturbed, undemocratic fashion. Thus the ideas and views of personnel at the school level are seldom, if ever, solicited in this exercise and are certainly not used as critical inputs. As a result, it is easy to develop draft polices which are then implemented by the Ministry and which end up creating critical problems for teachers.

A case in point is a feature of the Education Act of 1973. Under this Act, headteachers no longer have the power to expel those students from school who are guilty of behaving in a manner considered dangerous to the safety of staff and students and who undermine the school's standards of discipline. Only a maximum suspension of two weeks is allowed. This change has made it more difficult to maintain 'good order and proper discipline' in state schools while private schools are under no such legal constraint; their level of order and discipline is generally, therefore, much higher.

(c) The Ministry is responsible for resourcing the schools with everything from chalk to teachers. So their fortunes rise or fall depending on the quality of the Ministry's resourcing function. If we observe the procedure for supplying schools with staff the evidence becomes apparent. Heads have to submit their request for staff to the Chief Education Officer; the Ministry then carries out the selection procedure and assigns the successful applicant to the school. Heads therefore have no formal say in determining who will be added to their staff and often find themselves saddled with staff members who just do not fit into the school culture and may, in fact, turn out to be liabilities.

(d) The Ministry attempts to ensure school development by concentrating almost exclusively on its directing and supervisory roles. But at this stage of the schools' development, it can best assist them by emphasising, if not completely adopting, a consultancy and facilitating role. This view is supported by Fenech (1994, p.163) who argues that Ministries of Education need ...

... to undertake research in schools and use the knowledge gained to assess and ensure the quality of educational provision ... to develop a consultancy role in order to promote school-based professional development.

He argues further that a strong central role is important but should be limited to establishing a vision for the system as a whole, setting expectations and standards for student learning and providing strong support for schools.

Administrative/ management structures in schools

The administration/management structure in place in schools today is not comprehensive and sophisticated enough to accomplish its designated tasks. It is basically the rudimentary one inherited from the British during the colonial period. Back then, maybe such a structure was adequate enough since schools were much smaller, students less in number, more motivated and better behaved, parents more co-operative and teachers fell easily in line. In addition, the British as rulers were not accountable to local voters. Today, the situation is very different. Schools are now much larger, students and parents much more problematic and demanding, and teachers are less compliant, while the range of curricula and extra curricular activities is daunting. In addition, both the Ministry of Education and the schools are accountable to the voting public. This structure, therefore, needs major reform, if not revolution, in order for it to be able to handle these tasks.

In an effort, then, to have the structure designed for the task at hand, it is proposed to first strengthen management capability at the school level by bringing in an assistant head stream and a supervisory stream. In this way, heads of school would be relieved of certain duties and have more latitude to provide the type of leadership and management role that is required of them. Such a devolution of power and division of labour should result in an overall efficiency in the running of the schools, and consequently go some way towards bringing about the desired educational outcomes.

Students too must be brought into the administration/management of schools. One traditional way is to involve them as monitors and prefects; but another more imaginative way is to involve them in more 'core' school functions, such as resource management, time-tabling and curricular development. Such 'student ownership' may sound anathema to many educators; but perhaps we should remind ourselves that schools exist essentially for students, and not for teachers, parents, civil servants or politicians. Hopkins *et al.* (1994, p. 126) support such a move:

> *Pupil involvement seems to be a particularly important factor in school improvement. The research suggest that this can occur at organisational level,*

by involving pupils in decision making and encouraging them to take responsibility for day to day routines.

School culture and its impact on tasks

The culture existing in the administrative/management system of the school embodies its own set of counter-productive features. It is characterised by competitiveness instead of co-operation, individuality instead of collaboration and collegiality, conformity to routine rather than innovation, as well as by an absence of deep reflection.

In such a setting, the failure to reach key educational objectives is self-evident. Let us consider the impact of such a school culture on two specific school tasks:

1. Supervision, which includes class control, instilling the right discipline, creating the right atmosphere for the teaching–learning process to take place, is accomplished through negative measures. Teachers display a 'prison warden mentality', placing far too much emphasis on punishment as a means of control. Students are perceived by various teachers to be 'very rude and disruptive' or 'highly irresponsible', and therefore must be kept under tight control through constant reproach and an over-liberal use of the strap. Praise and reward as a means of positive reinforcement are not deployed enough. In this way, teacher authority is undermined and replaced by the transparent use of power. This is certainly not conducive to an educational environment.

Because students are forced to work in this environment filled with fear and tension, many either consciously or subconsciously associate learning with a very negative and unpleasant experience (Hopkins *et al.*, 1994, pp. 46–7). No wonder that they do not learn well.

2. The teaching function is conducted in a very individualistic manner. There is a marked absence of collegiality and collaboration, so activities such as peer observations and review, coaching, clinical supervision, which would provide an ideal opportunity for teachers to advance professionally, do not take place. Admittedly, the small-scale environment does not help here, since individual teachers are well-known – *too* well-known – to each

other and they may not wish to have any more 'invasions' of what they may consider as their only private turf. One overall effect of this is that teaching effectiveness in the classroom is not improving. According to Handy and Atkin (1986), the effectiveness of teaching deteriorates:

> *... because teachers do not reach beyond themselves to be part of something that none of them would have attained on their own and to discover ways of working with others to mutual benefit.*

It should be mentioned also that because of the nature of this atomistic culture, teachers in both primary and secondary schools do not see themselves as part of a community and they generally fail to engage in inter-school collegiality, collaboration and reflection. Schools end up poorer as a result.

Recommendations

This article has briefly analysed and evaluated the administrative/management systems prevalent in the Ministry of Education and the schools of Antigua and Barbuda in relation to their contributory role to the current crisis in the educational system.

Clearly, the Ministry should encourage a critical operational review exercise of its functions, since this is likely to suggest the need to carve out specific sections/units which are expected to be highly flexible and more humane and within which formal and informal structures can work in tandem. Cultural reform is admittedly more problematic, but the staff should certainly be party to any 'change management' initiative. The demonstration effect of any partially 'hived-off' functions within the Ministry should also be instructive.

At the level of individual schools, the Ministry should put the necessary procedures and facilities in place to give school heads the opportunity to manage their schools more effectively, by allowing them to have some influence in the employment of teachers in their school; the granting of promotions and increments to their teaching and non-teaching staff; and the introduction of additional, management grades at school level to boost their administrative capacity.

The Ministry is also expected to work with the schools in order to plan and implement a programme of training that would help develop the management expertise required to handle the increase power and responsibility that such a devolution would bring.

In order to provide the kind of administrative/management support needed at the school level, the Ministry should tone down its role as an omniscient authority figure and see itself increasingly in the guise of a mentor and facilitator.

Bearing in mind the essential roles that a planning and a curriculum unit can play in the overall development of schools, government should consider bringing these units on stream as soon as possible. In identifying the persons best suited to head such units, one to envisage straight away the appropriate relationship expected with the rest of the hierarchy.

In order to give teachers the regard and respect they deserve as professionals while at the same time ensuring that the Ministry operates in the best interest of the schools, the latter should encourage an effective, two way communication system between itself and the schools. Teachers should be encouraged to provide critical input in the Ministry's policy and programme drafting exercise. For such encouragement to be more than a vain exercise in rhetoric, any input received from teachers must be seriously considered and fed into implementation, with the teacher(s) concerned being given suitable feedback and information.

Heads and staff should be encouraged to realise that a progressive school culture can improve motivation of both staff and students. They would thus be incentivised to practise collegiality, foster innovation and undertake sober reflection about the educational process and its intended outcomes. Our society and economy value and thrive on entrepreneurial skills; while our polity and citizenry value democracy; these must somehow ensure and support an educational system which fosters such skills. Realistically, this process can only take place within a general policy of devolution of control away from the centre.

Conclusion

One must admit that the feasibility of implementing these far reaching recommendations may look rather slim. Educational reform is complex and 'messy'; key persons might be hesitant or unwilling to '... face up to the need to change some things and to provide more or different resources' (Handy, 1984, p. 34); the general pessimism of the author of this chapter may also be unwarranted. Trusting in the existing bureaucracy to transform and reform itself may prove to be illusory; yet, introducing a change agent without foresight and diplomacy may generate an unassailable wall of suspicion, resistance and hostility, effectively scuppering any programme of change.

Nevertheless, the opportunity for these recommendations to be adopted and implemented exists. A frequently heard comment among the Antiguan and Barbudan people is: something must be done about these schools. Politicians too, on either side of the political divide, claim to perceive the need for change, although they may disagree over its detail. Key policy-makers and stakeholders are also likely to be prepared to consider these recommendations.

Given the social ecology of Antigua and Barbuda, the Minister of Education, leading policy-makers and important stakeholders are all very accessible. Assuming that these recommendations are astutely lobbied for, it should be possible to muster the political will for reform, recruit the administration's willingness to toe the line and thus get the required changes implemented.

DISCUSSION POINTS

- **How is change best managed – from within or from without? Discuss the strengths, weaknesses, opportunities and threats presented by each of these two options, preferably in relation to an actual condition.**
- **If the practitioners in the educational system feel overwhelmed by the malaise gripping the system, what is the best approach for them to introduce meaningful and effective change? What type of change would one propose?**

18 Decentralising Education in St Lucia

Marcus Edward

KEY ARGUMENT

- Educational decentralisation is assessed within a context that raises questions about the autonomy, accountability, efficiency and equity of the process.

SMALL STATE CONSIDERATIONS

- Small states are not immune from the problems of centralisation and bureaucratisation and can therefore benefit just as much as larger states from a decentralisation strategy. However, the costs associated with such a move are likely to be more onerous, given the difficulty of achieving economies of scale.

Decentralisation rules

In both developed and developing countries, large and small, there has been a growing interest and a definitive trend in favour of the decentralisation of control as against the provision of state-driven, educational services (Morphet *et al.*, 1982; Conyers, 1985; McGinn, 1990). A significant aspect of current decentralisation trends is that they facilitate and encourage more effective popular participation, ownership and commitment within an overall development process. Decentralisation policies have become key planks of institutional restructuring. They engender a new distribution of authority through the establishment of an administrative structure where the state releases itself from a number of traditional functions in order to concentrate and focus its activities in strategic areas: incentives and policy formulation, monitoring and evaluation of examination results, innovation, co-ordination, quality control and research (Conran, 1989; Lunnenburg and Ornstein, 1991). Fenech (1995) posits that the decentralisation of the educational system should involve the devolution from the central office to school level of decision-making, primarily in the following eight areas: syllabus construction, curriculum development, school organisation, selection of textbooks, tests and examinations, teacher deployment, professional development and contacts with the community. Decentralisation policies are becoming the pivot for institutional restructuring and, as Caldwell (1993) has pointed out, such a policy has crucial implications for planning and resource allocation.

Advantages and disadvantages

Of course, decentralisation is no panacea for the problems and challenges faced by an education system. It has its own pitfalls and shortcomings. Five disadvantages associated with decentralisation are:

- It can introduce great variety in standards within the educational system. Variety may prove a virtue; yet it can run amok when it sends specific signals to students, teachers or parents about the suitability or otherwise of a particular educational institution.
- To the central office, decentralisation may compound the task of monitoring and evaluation. Since the decentralised system involves greater freedom of action by schools, the centre would be hard pressed to obtain, let alone assess, any information forthcoming from such increasingly multifarious institutions.

- It could become increasingly difficult to ensure fairness within a decentralised system. Resources would be distributed on the basis of need and, as a result, some may feel that equality has been compromised, even if it results in equity.
- Decentralisation could prove to be more expensive since new sub-units need to be set up, additional staff recruited and training provided. It may also involve the provision of new equipment. Critical mass will be more difficult to achieve, especially in small islands or archipelagic island states where discrete educational infrastructure can be even smaller and more dispersed than in other, larger territories.
- Finally, decentralisation is not a simpler form of management, but a more complex one. Since it introduces a redistribution of tasks amongst different levels (central, district, local, school), it effectively multiplies the levels and actors that are involved in its management. A great deal of duplication, wastage and communication gaps can thus result (Bloomer, 1991).

Feasibility of decentralisation

The central focus of this article is to discuss the feasibility of decentralisation policies, with special reference to the educational system of St Lucia. This needs to be undertaken in the context of a small island state with a total national student population of 46,000, wanting to encouraging local participation in educational development. Perhaps, from a large state perspective, one might think that the inherent small size of a small jurisdiction renders the educational system fairly fluid and amenable to the achievement of the same results expected from a decentralisation drive. But this is not true. The tendency for the retention of power by the core, and the unwillingness to accept new responsibilities by the periphery, still applies, even in micro-states.

The formal call to decentralise in St Lucia's education came in a Cabinet paper by the Minister of Education in 1997 in which he called for a restructuring exercise: '... to re-engineer the Ministry of Education from being a command centre to being a service centre' (Ministry of Education, 1997, p. 3). The document articulated the political will to invest in a transfer of authority: that is, to plan, make and take decisions, as well as manage the educational service, from the existing national level to the school or district level.

Analytic framework

Like most other forms of change, educational decentralisation must be couched within an analytic framework. Such a framework generally reflects a philosophical orientation to decentralisation and delineates the role of stakeholders. Bullock and Thomas (1997) noted that educational decentralisation should be assessed within a context that raises questions about autonomy, accountability, efficiency and equity of the process.

These four themes – *autonomy*, *accountability*, *efficiency* and *equity* – constitute the pegs of a useful analytic framework for our purposes. They generate central issues against which one can assess and compare efforts at decentralisation. It is necessary, therefore, to elaborate on those themes since their respective meanings provide the framework for the analysis of decentralisation of education in St Lucia.

Autonomy

Autonomy as a key issue addresses the question of 'who is taking more control and/or less control over decision-making?' (Bullock and Thomas, 1997, p. 41). Greater autonomy suggests an apportioning or dispersal of power away from the top levels of the hierarchy down to the lower levels, to the rank and file (Bloomer, 1991; Lauglo and McLean, 1985). The impact of decentralisation on autonomy in the school context may be assessed at three levels: that of the learner, the teacher and the school management. A prime test of decentralisation is the degree to which individuals are allowed the requisite autonomy to make choices.

Administrative decentralisation (or deconcentration) involves a shuffling of bureaucratic and professional staff for more direct 'field' contact – such as the appointment of District Education Officers in St Lucia. Political decentralisation (or devolution) concerns a shift of power from professional or technocratic elites to citizens and communities (Grant, 1979; Conyers, 1985).

The ability of educators to select and match resources to needs is one way in which autonomy is manifested. Greater centralisation of the curriculum, on the other hand, lessens the autonomy of teachers and the school over the teaching-learning process. One must admit, though, that the practical conditions of the education system will influence the degree of autonomy which will be allowed. In some cases, schools may not have the capacity to assume and sustain extensive institutional autonomy. The fact that schools vary in the composition of the teaching force means that autonomy may have to be devolved on the basis of the capacities of the staff. The less trained the staff, the greater the need for centralised policies which offer guidance and support to teachers. However, even where the case for increased autonomy is strong, it must be supported by increased accountability.

Accountability

Autonomy should not mean unfettered license for learners, teachers and the institution to do as they please. In a very general sense, stakeholders must recognise that they are accountable for the resources made available to them by the state. Decentralisation is intended to engender greater levels of institutional accountability to the state as provider of resources, as well as to students, parents and the wider community. Furthermore, if government, teachers, students, parents and the wider community are accepted as stakeholders in education, the decisions on what happens in schools and how it is done should not be the exclusive prerogative of any one group, although some groups may have a greater say than others.

Educators should be accountable to the other stakeholders for what they do. This is the only way of ensuring that schools will fulfil their mandate of producing individuals who are equipped to serve society. In addition, accountability can contribute to improving the quality of the school. The management of the school can be improved if the principal engages in dialogue about school matters, allowing for critical analysis by others.

Accountability is, in its turn, closely linked to the efficiency with which a school is run.

Efficiency

According to Bullock and Thomas (1997), the efficiency concern of decentralisation begs the question: 'Has the match between resources and needs been improved or worsened?' (p. 41). Efficiency is concerned with how much value or output is obtained from the resources provided to the school. Bullock and Thomas further note that posing the question of efficiency necessitates asking questions about what resources are used for and to what extent they match the intended purposes of the school. It also suggests questions concerning the use of some objective results or indicators as measurable criteria for determining efficiency (ibid.).

Targets can be devised to enable one to look seriously at whether the school has indeed been effective in meeting its declared aims and objectives. One also needs to appraise whether a school is cost-effective, ensuring that physical and human resources are well matched to purposes, with low levels of material or human wastage or misallocation of resources.

The maximum utilisation of scarce resources allocated to the school is a central objective of the decentralisation drive. However, assessing effectiveness in education will require qualitative judgments on a wide range of information about the school.

Equity

Equity as a regulatory principle in decentralisation is concerned with the 'fairness' of the system. Wain *et al.* (1995) posit that an educational system should encourage social and ability mixing while at the same time prove flexible enough to ensure that the different learning styles and needs of students are catered for. It is recognised that individual differences with respect to socio-economic status, culture and intelligence exist naturally amongst students. By acknowledging such differences, schools are more likely to promote the specific human development needs of students.

Bullock and Thomas (1997) add that schools must give priority to the needs of individual students while recognising and respecting their diversity. It is recommended further that schools cater for individual differences in such a way that, within the context of co-operative learning, students can follow different paths that ultimately lead to similar goals

(Wain *et al.*, 1995). McGinn (1990) argues that decentralisation should not only reflect administrative emphasis on 'equity of access' but also 'efficiency in management'. This improves the relevance and responsiveness of educational schemes since they allow greater flexibility in implementation as well as oblige a stronger adherence to relevant results. This is a far cry from merely 'measuring school success' in terms of student enrolment figures or exam pass rates.

Although not exhaustive, the four themes – autonomy, accountability, effectiveness and equity – provide a means of engaging in discussion of the forms and extent of educational decentralisation.

The next section examines efforts to decentralise the education system in St Lucia. Though vaguely defined, the Ministry of Education, Human Resource Development, Youth and Sports is incrementally devolving authority to school and district levels.

Management reform

St Lucia's education system has historically been largely centralised, with the Ministry of Education being responsible for most functions of the education service, including recruitment and discipline of teachers, curriculum development and financing the education system.

The formal call to decentralise the education system in St Lucia was contained in a policy pronouncement by the Minister of Education, Human Resource Development, Youth and Sports who in 1997 called for a restructuring exercise: '... to re-engineer the Ministry of Education from being a command centre to being a service centre' (Ministry of Education, 1997, p.3). The Minister then articulated the political will to invest in a degree of transfer of authority to manage the education system at school or district levels.

The statement was followed by the launch of a major process of reforming the delivery of education services with the underlying principle being to make 'the school the centre of focus of the education system.' The following are the significant highlights to date in keeping with that trajectory.

- The **Education Sector Development Plan** was completed in 2000 and charts the direction for the system for the period 2000–5. The plan was developed using an intense consultative process and seeks to address local, regional and international imperatives in education. The input of students, teachers, principals and other organised bodies was significant in the final content of the sector plan.
- **Education Districts** have been reorganised to allow Education Officers to provide better management support to schools. This includes providing faster and more direct services to the schools consistent with the Ministry's objective of becoming a 'service centre'. The reorganisation also resulted in the creation of two new Education Districts to achieve a more even distribution of schools among the various districts.
- Enactment of new legislation to govern the education system. A new **Education Act** came into force in 1999. The new act replaces the 1977 legislation and identifies the new roles and responsibilities of all key players in the management of the system.
- **Management Training**, delivered by the Institute of Business of the University of the West Indies, has been conducted for all principals/vice principals and senior teachers. The training emphasises exposure to and use of various tools and techniques for undertaking school-based school development planning. All schools are now required to develop School Development Plans (SDPs). Such plans generally cover three years, with objectives, resource requirements and activities delineated for each year.

Reforming procurement

In small island states like St Lucia, the centralisation of decision-making is advocated often on the premise that it engenders greater efficiency and economy, especially in the procurement of materials and equipment for schools. Many argue that cost-effectiveness is realised, for example, when the Ministry purchases school supplies in bulk and then redistributes them to schools. The problem is, however, that some schools find themselves saddled with items which they do not really need.

Issues of procurement are deeply embedded in policies for school financing and resource allocation. The Ministry is acutely aware that its existing financing policies favour some schools more than others. Thus, how to ensure greater equity in resource provision is the subject of ongoing investigations. As an interim measure, the Ministry is providing a small grant to every school to be used entirely at the school's discretion.

Budgeting and resource allocation

Institutional factors set boundaries within which the education system has to operate. The state is the dominant player in the education system and mobilises and controls most of the resources for education. St Lucia, like most other Commonwealth Caribbean jurisdictions, regards the provision of education as a social good that has to be paid for by the state.

The budgeting/financing function is one of those tasks which the Ministry of Education could not easily decentralise. The lack of functioning Local Councils and well-structured school boards makes this even more difficult. However, as already noted, the Ministry is seeking to review its school financing and resourcing policies as well as its school management support systems with a view ensuring increased equity, while allowing schools some measure of control over their financial resources.

Teacher recruitment

The task of recruiting teachers is another function of the central Ministry which cannot easily be decentralised. Completely decentralising this task in a small state like St Lucia with high levels of familiarity among residents and extended family ties could render the process wide open to gross nepotism and patronage. It would also engender resentment from the central office, since such a reform would be perceived as a significant loss of control over a crucial political resource.

A current effort is to have each school served by a School Board which will, *inter alia,* assist in teacher recruitment. The composition of such boards is delineated in the 1999 Education Act. The school boards set out transparent recruitment and selection criteria for teachers. The Ministry of

Education remains responsible for minimal certification requirements for teachers. While this process may engender greater levels of fairness and transparency in teacher selection, it may still be prone to accusations of unfair practices. In the final analysis, all recommendations for the hiring of new teachers made at the school level and supported by the Ministry have to be sanctioned by the Teaching Service Commission which by statute has the authority to approve teacher appointments.

Remuneration

Issues of remuneration and salary negotiations are best handled by the central office. If schools were to bargain individually with the trade union for salaries and working conditions for their teachers, different terms and conditions might be created for teachers in each school. On the other hand, one could argue that the best schools would be in a position to offer better conditions of employment, thus attracting or retaining better staff, which in turn would attract better students; however, that would also mean that other schools would fare worse!

Decentralisation certainly increases the potential influence of market forces in the educational system, which has historically been immune and protected from such tendencies.

Teaching and learning

It is in the areas of teaching-learning, curriculum development and implementation that the decentralisation of education in St Lucia may prove most effective. Small states like St Lucia have to prepare their citizens to be flexible and creative if they are to grasp and make the most of the limited and elastic socio-economic opportunities which exist. For this, an education system which gives schools the autonomy to be flexible and creative in deciding what it should teach its pupils is of paramount importance.

The role of the school in curriculum development and implementation has already been mentioned. This may be difficult in the present situation of centrally set curricula, syllabi, teacher guides and student textbooks.

However, ongoing curriculum reform efforts seek to: (a) engage in wide stakeholder consultations in curriculum development; and (b) establish the central Ministry's role as mainly to prescribe a National Minimum Curriculum consisting of broad goals in each subject area to be pursued by all schools. The schools would then have enough latitude to develop their own programme of instruction and pedagogy around the common minimum curriculum.

Conclusion

This chapter will conclude by reviewing the major issues that have been raised as concluding observations. This is done by posing key questions about education decentralisation followed by brief responses. Here again, the current practices in St Lucia and the implications for small states are fleshed out.

What is the rationale for decentralisation?

In recent years, many educationists as well as political theorists have been asking questions regarding who controls and/or ought to control education. In many countries, the dominant role of the state in education is being challenged. One main theme of these multifarious outcries is that the professional character of principals and teachers in education should be better recognised.

Economic, political and technical considerations seem to underpin the decentralisation efforts in St Lucia. The rapid expansion of the education system, especially at secondary and tertiary levels, has strained the capacity of the central office to maintain quality, engendering public dissatisfaction with the education system. The decentralisation effort seeks to empower stakeholders to make decisions about the schools and at the same time contribute to the resourcing of the institution.

In addition, the availability of effective information and communication technologies has made it possible to keep the central office well informed of developments at school and district levels. Thus, there is less anxiety at the central office about being uninformed of events in the education districts and schools.

In sum, the decentralisation effort seeks to:

- Increase the amount and quality of inputs to schools;
- Reduce inequalities in resource provision among schools;
- Relieve the central government of some of its bureaucratic responsibilities;
- Redistribute political power.

What forms can decentralisation assume?

Decentralisation can assume various forms of which two are predominant. In one instance, decentralisation may only mean an effort to mobilise more resources at the local level for education, rather than central government bearing the whole burden of financing. A certain transfer of responsibility is made towards local authorities (where they exist!), or to the school, with a view to involving them more in the sharing of educational expenditure. Decentralisation may also mean a certain delegation of power to a regional sub-office with the sole objective of increased efficiency in the use of resources and the monitoring of the implementation of state policies. Thus, the administrative process may be accelerated; but ultimate power basically continues to lie with the centre.

The decentralisation of education in St Lucia is seen first as an extension of professional rather than managerial jurisdiction. Heads of schools, along with teachers, parents and other community actors, are being trained and empowered to make decisions regarding school policy in areas such as the curriculum, pedagogy, assessment, discipline and overall school development. The more complex managerial duties, such as budgeting, maintenance and staffing, would be taken onboard more gradually.

What functions and powers should be decentralised?

This question has no simple answer and has ideological connotations. Powers of decision-making in any or all of the following can be delegated to the local level: curriculum development and implementation; teaching methodology; formulation of school-development plans; use of facilities, supplies and equipment; staff recruitment and deployment; the allocation of time to particular tasks; the use of pre-allocated funds; which pupils are to be admitted to the school; and how pupils are assessed.

The areas to be decentralised, the tempo of the process and the extent to which this will happen will be strongly determined by the capacity of the local level to absorb and efficiently perform the decentralised functions. Here the availability of trained personnel is of paramount importance. The willingness of the political elite to push the whole process forward must also be factored in.

The delegation of resource management to schools is contingent upon their ability to manage these resources responsibly. In St Lucia, the implementation of an Education Management Information System (EMIS) that collects, stores, analyses and supplies relevant, reliable and timely information to school management greatly facilitates the school development planning process and guides decisions on the optimum use of available resources.

Delegation of resource management will be supported by a strengthened management support structure. Education Officers and Curriculum Officers now play a greater role in helping schools assess their needs and co-ordinate implementation of school development plans.

What problems are associated with decentralisation?

The problems associated with decentralised control are more likely to result from a failure to prepare adequately for its introduction. A key bone of contention is that decentralisation can produce inequalities in the education system, leaving governments with the impossible task of trying to regulate standards. It could also be deployed as part of a neo-liberal policy of divesting responsibilities and resources away from education.

It is generally agreed that decisions regarding the curriculum, as well as teaching and learning strategies, are best made locally and should be undertaken by the school personnel closest to the teaching–learning process. This would allow for dynamism and flexibility by the staff to meet the specific needs of their specific customers. There are obviously certain constraints in pursuing such a policy in St Lucia. The lack of resources, especially in terms of trained teachers, needs to be addressed urgently. If decentralisation is to begin with greater devolution of responsibility for curricula and pedagogy, then serious attempts must be made to raise the educational and professional competence of teachers. The 66 per cent of trained teachers in the primary school system does not augur well for such decentralisation.

What are the prerequisites for effective decentralisation?

Decentralisation has a variety forms. Hence, the preconditions necessary for it to work would depend on the form and extent being contemplated. However, key elements necessary for any form of decentralisation include:

- a system of ensuring accountability by the school or local authority;
- the guaranteed availability of required resources;
- an efficient management structure, to facilitate communication and decision making;
- a context of mutual confidence and open, informal interaction among all stakeholders.

The Ministry of Education, Human Resource Development, Youth and Sports in St Lucia has instutionalised school development planning as the main vehicle to support the decentralisation drive. School Development Plans are now ubiquitous in the education system. Training has been provided to all school principals on the processes and techniques for the elaboration of SDPs. The Ministry is also seeking to reform its school financing and resourcing policies to ensure a closer match between resource provisions and SDPs.

Decentralisation in decision-making in St Lucia necessitated a review of the roles of education officers, principals, teachers, parents, schools boards and other stakeholders. New roles involved increased participation in shaping education policy, a task which so far has been the prerogative of the technocrats at the central office.

Designing a scheme for decentralisation

A scheme of decentralisation requires that the central office reflects on each of its functions and asks which of them could be best administered at the school or local level. The scheme also implies the development of a new relationship between the central office, the district office and schools. Whatever the nature and the extent of the decentralisation introduced, all parties have to assume new roles and increased responsibilities. A good starting point is to identify the various facets of education management and analyse these in terms the locus of decision-making authority. (Figure 18.1 shows a form for conducting such an analysis.)

It is only when decentralisation is accompanied by a real change in the decision-making process, involving greater popular participation, that there will be true modification in the distribution of power. The Ministry must cede new powers to schools; however the former must formulate clear policies and prescribe the framework within which schools can exercise their new powers. Delegation is not an abnegation of responsibility but a revision of the issues for which the centre, the region or the school are responsible. Within this framework, decentralisation should engender a greater release of energy, commitment and ownership in the attainment of shared objectives.

Finally, I wish to point out that the information presented here is only indicative and by no means exhaustive. Furthermore, while much has been written on decentralisation in most of the developed countries, there is a serious dearth of information or theorisation on decentralisation in small states. Thus, the question of the impact of a small economy on decentralising education is yet to be explored extensively.

Further studies are required in the St Lucian context to meaningfully guide the proposed decentralisation of education. A thorough review of the local education system and its key actors, and their capacity to absorb delegated management needs to be undertaken. Similarly, studies to address concerns about the existence of preconditions for decentralisation are needed. It is hoped that such studies will provide valuable information to policy-makers which can then be used to implement an even more effective, equitable and efficient decentralised education system.

Figure 18.1: Sample Front-End Analysis Form

District Office	Central Office	School	Category	District Office	Central Office	School
The way it is				The way we'd like it to be		
GOVERNANCE						
			Policy development			
			Planning			
			Management			
SCHOOL ORGANISATION						
			Management structure			
			Minimum inputs			
			Design			
			Pupil promotions			
			Discipline			
			Data systems			
			School evaluation			
FINANCING						
			Recurrent			
			Capital			
TRAINING OF STAFF						
			In-service			
			Pre-service			
CURRICULUM						
			Subjects			
			Content			
			Courseware			
			Pedagogy			
			Pupil assessment			
RESEARCH						
			Needs			
			Conduct			
			Implementation			

DISCUSSION POINT

- To what extent does the situation in your country reflect that of St. Lucia? Can you offer examples from your own environment where decentralisation has succeeded and where it has failed? Can you suggest reasons for such results?

19

Curricular Reform in Seychelles Seconday Schools

Selby Dora

KEY ARGUMENTS

- Education cannot be blamed for presenting itself as a relatively easy, effective and uncontested platform from which to launch ambitious reform programmes.
- The localisation and indigenisation of education is a keen pursuit of most post-colonial, developing states. But it is a challenge to transform educators bred in a different pedagogical regime into effective promoters of desirable change.
- Curricular development becomes even more difficult to implement if key change agents, such a head teachers, are seen as mere transmitters of policy fashioned at a political level.

SMALL STATE CONSIDERATIONS

- Recruitment to critical posts in small jurisdictions is often a complex combination of objective attributes and personal qualities.
- In small labour market segments, it may be useful to draw upon expatriate teachers to fill in vacancies, usually in the context of an indigenisation drive. The commitment and orientation of these to

any national development efforts will not be similar to that of local personnel.

- **When continuous professional development of teachers is entrusted to external 'big-state' players, the vital need of schools to be relevant, in multifunctional ways, to their localities and communities tends to be underplayed.**

Introduction

One of the decisions of the 1991 education reform in the Republic of the Seychelles had been to centralise all responsibilities pertaining to the development of a unified and integral system of formal education. This task was mandated to the Curriculum Development Section, formerly known as the National Institute for Pedagogy.

This chapter reviews some of the key challenges faced by the Curriculum Development Section within this overall reform exercise. A critical appraisal will be made of the difficulties of staff recruitment to the section, as well as of the manner in which teaching–learning programmes were reviewed by the section in order to fine-tune and better orient its vital contribution to cultural/national development, school and community participation and economic modernisation. Finally, the chapter reviews how a failure to identify the key role of headteachers as important actors in change management has generated serious problems in the implementation of curricular reform.

Personnel requirements

The official prerequisites for recruiting Curriculum Development Officers included the following objective criteria:

- A minimum of three years post-certification teaching experience;
- Preference to be given to Seychellois degree-holders;
- As far as possible all posts should be 'localised'.

The main mode of candidate selection has tended to be through what Baldacchino (1994b) terms 'recruitment through the network', rather than through official interview procedures; all recommendations for appointment have to be endorsed by the Minister of Education and Culture. Those selected were essentially experienced teachers who were judged to have demonstrated their competence in a given subject area at school level. However, one should not lose sight of the potentially important role that the many 'unofficial' prerequisites can play in influencing final decisions regarding the recruitment of personnel in small island communities. The quality of relationships with power holders cannot be left out of the reckoning, since the effectiveness of any change management policy will depend not only on skill and experience, but also on the ability to convince, guide and oblige stakeholders to accept one's convictions and visions. Loyalty and trust are also important qualifications:

> ... *if a plodder wants to reach the top, s/he has to earn the trust of his/her superiors. S/he must not present the image of a disloyal troublemaker. Otherwise s/he will sing the swan song. You need loyalty, allegiance and general acceptance and must not be seen as a threat.* (Ibid., 1994, p. 7)

Most of the vacant posts were filled by experienced Seychellois ex-teachers. However, it was not uncommon to find candidates fresh out of tertiary education being recruited. Efforts were made to fill the vacancies in the shortest possible time; but the shortage of quality human resources obliged a resort to the recruitment of non-Seychellois in certain areas of teaching-learning programme development, such as the physical sciences and mathematics. Additional staff were also recruited in the capacity of consultants and/or advisers as part of agreements reached between the Seychelles Government and other friendly governments. This dependence on foreign experts may have boosted the respectability of the section, and was certainly expedient and perhaps inevitable in the circumstances. However, in retrospect one could argue that it may have somewhat blunted the intended commitment of the section to purposeful change in line with national development goals.

The general picture tended to be one where the majority of the posts were filled by Seychellois, ex-specialist, graduate teachers who had considerable experience but, on the whole, lacked the necessary professional expertise in the fundamentals of curriculum development. This competence was gained primarily through on-the-job experience and self-study, and occasionally through short courses overseas, though not necessarily in other small island states.

Scope of the teaching–learning programmes

The teaching–learning programme in Seychellois secondary education is particularly geared to address three interrelated dimensions of the formal curriculum: cultural/national identity development; school and community participation; and economic development and modernisation. These are considered, in various official policy documents, as fundamental precursors to the development of the desired new society.

Cultural identity and national development

The educational system of the Seychelles until the late 1970s was carried over from the colonial era and it therefore tended to reflect the cultural values and priorities of the colonisers. It had also successfully sustained a privileged elite, while effectively marginalising the large majority of the local population from having a stake in a system which mainly labelled them as ignorant and turned them into dropouts.

Education was called upon to play a leading role within the espoused new vision for cultural development. The following statement is typical in capturing the spirit of the times:

> *Our Culture is in development. It is being broadened in the scope and open to all. Education should develop the capacity of Seychellois to contribute to their culture and appreciate the contribution of others. Through innovative programmes it should stimulate the renewal and transformation of our culture through schools and through society itself.* (Ministry of Education, 1985, p. 12)

The school was to be transformed as an agent of local (rather than foreign) identity, a promoter of indigenous cultural celebration and maintenance.

The manner in which such an ambitious goal was to be realised is spelt out in the same policy document:

> *Consistent with the Government's principle of democratisation of culture, all students should participate in culture activities and are given opportunities to develop their talents from an early age. They should also study our culture and acquire skills of organising activities and developing cultural activities within our communities.* (Ibid., p. 23)

At the secondary school level, attempts to implement these policy guidelines were primarily through the encouragement of students' involvement in cultural activities using the Creole language (either oral and written) in areas such as traditional dance, music, folklore and literature in such forms as poetry and story writing.

However, various difficulties were encountered in the implementation phase. There was a serious lack of written literature available to use as educational material; there was also a lack of research culture and expertise in this area. Furthermore, 'culture education' was never time-tabled as part of the formal secondary programme of study and remained a marginal extra-curricular activity. There was also a tendency for such programmes to be preoccupied with superficial and banal features of cultural/national identity, rather than focus on the more fundamental values of unity and nation-building in the students' relationships with one another as citizens of one nation.

Meanwhile, the majority of the culture education personnel, who were themselves not professionally trained, were experiencing a painful cultural identity crisis, having evolved through an educational system where their own culture was never recognised. Many were embarrassed and ashamed to communicate in written Creole and often considered it inferior to English or French. The use of Creole was banned in schools during their school days and in the case of the two grammar schools, its usage was also banned on campus. In this regard, Pliya (1985, p. 216) makes similar observations in respect of the African context:

> *The prestige retained by the colonising countries' language plus the difficulty of mastering national languages which have not been sufficiently structured*

or even in basic literacy work are factors hindering the assertion of cultural identity which in the past was negated, destroyed, indeed obliterated by the formal ban on speaking of African languages in schools. ... it is far from easy to smooth out this distortion.

School and community participation

The policy guidelines of the teaching–learning programmes also emphasised the promotion of stronger links between the school and the community in which it was located. The policy was directed at promoting the interest and participation of the community in the school located in its midst and, reciprocally, the participation of the school in the development of the community. Such a philosophy is reflected in the following extract:

> *Just as the school serves the community, so should the community serve the school. The school should join the district branch in promoting a commitment to the community service, to voluntarism, to cultural animation and to other activities which work to integrate the school into community life and the community into school life.* (Ministry of Education, 1985, p. 10)

At the programme implementation level, the use of the local language and aspects of culture education already addressed, and partly facilitated, the implementation of these policy guidelines. Other implementation strategies included the employment of local craftsmen in certain areas of vocational education, the involvement of schools in community-based projects such as monthly clean-up campaigns and the creation of Teacher-Parent Associations.

Unfortunately, much of the activity did not appear to be part of a sustained planning strategy backed up by relevant research which kept in mind how the school–community relationships have traditionally evolved. Of relevance here is the 'micro-politics' of schools as organisations which greatly influence the pattern of interactions between headteachers, teachers, parents and the community in general (Malen, 1994). Consequently, many of the activities had limited impact on the development of school-community dynamics in the context of the teaching–learning programmes.

It should not be forgotten that schools, like all organisations, are intrinsically political in that ways must be found to create order and direction among people with potentially diverse and conflicting interests. The politicisation of education, along with the pressure put on the institutions to participate in 'nation building' in more tangible and relevant ways than in the past, may have compounded the situation in the schools and added to tension and uncertainty amongst school staff. Such a situation may have reinforced, as a form of defence mechanism, the autocratic style of management which has always been prevalent amongst local headteachers.

In addition, headteachers have traditionally been powerful figures in their community, and their efforts and influence in the successful implementation of this policy of 'embedding' was therefore vital.

Unfortunately, little or no effort was invested in preparing the headteachers either to understand the implications of the policy guidelines or to explore effective ways and means by which these guidelines could be implemented for the benefit of the school, the community, the students and the teaching staff. The result was policy statements without proper implementation guidelines and an army of sceptical, resistant or openly hostile headteachers. The latter diagnosed the new policies as more akin to an intrusion into what was traditionally their domain and a threat to their power and authority base, rather than a genuine strategy to carry out a badly needed overhaul of the existing secondary education system.

Economic development and modernisation

The views of Seychellois politicians on the presumed role of education in the country's economic development have been shared by many other leaders of developing countries. 'Many national leaders felt modernisation of attitudes and behaviours was an important pre-requisite for their countries' development' (Bishop, 1989, p. 4).

In the Seychelles context, the contribution of schools to modernisation was conceived essentially at two interrelated levels. On the one hand, there was an attempt at developing among youths in secondary school the attitudes and aptitudes that were considered necessary to facilitate their integration in the world of work–and to enable them to employ 'modern methods' in their daily work. This was mediated via the introduction and integration of pre-vocational education and skill training in addition to the traditionally academic subjects into the teaching–learning programmes. The strategy was initially implemented in the National Youth Service (NYS) and later extended to the other levels of secondary education as part of the 1991 education reform.

Such programmes were intended to increase the productivity and employability potential of secondary school leavers, since on average some fifty per cent of them, for reasons which include those with a planning dimension, do not have the opportunity to continue formal schooling. Thus, for modernisation to take root, it was seen as essential that students become 'carriers of modernisation'. This was to be done by the adoption of relevant approaches, methods, attitudes and material resources in their daily school duties, as well as by their being encouraged to be proactive in influencing the ideas and opinions of their peers, relatives and parents.

The teaching–learning programmes attempted to combine practical work/training with scientific inquiry methods – the utilisation of 'modern' methods in school workshops and/or farming plots and relevant basic knowledge of the field of study. So, for instance, students learning about agriculture were expected to acquire some basic knowledge about soil conditions and types of crops, diseases and pests, methods of cultivation and their application, through practical activities, on the school agricultural plot.

On the other hand, modernisation was seen as dependent on the availability of sufficient quantity and quality of academically competent personnel to sustain the growth of the modern sector in the economy. The pre-independence educational system had failed dismally in this respect, having served mainly as a channel for eventual recruits to public service employment and the traditional professions. The strategy adopted at the secondary level was to ensure that, alongside pre-vocational studies and training programmes, science and technology-oriented courses were offered. Technology related subjects, such as computer education, electronics and design technology, were accorded the greatest emphasis.

Once again, a sober assessment is called for. The limitations encountered in this area of teaching–learning programmes have been multifaceted. It is over-ambitious to expect schools to be all things to all people. One is reminded of Sultana's (1992, p. 296) comments regarding the effectiveness of schools in promoting qualitative vocational education/training:

> *Most of the literature suggests rather strongly that Grubb's hypothesis that "schools can effectively teach only general skills, and firms can effectively teach only specific skills" is correct, and that therefore the historical ineffectiveness of vocational education can be at least partly explained by the fact that it has attempted to do what schools do worst.*

The difficulty of finding a match between locals and competent teachers and trainers continues to plague the education system. According to policy guidelines, every effort was to be made to replace the numerous expatriates in the shortest possible time. A solution has thus far eluded the policy-makers, although one can argue that the problem has been contained.

Teacher education and the supply of teaching personnel

In addition to the ongoing programme of sending students on graduate courses in education/teaching at overseas universities (usually four-year courses), a linkage programme was developed as one of the measures to speed up the expatriate replacement process. Between 1988 and 1995, a programme was initiated whereby prospective secondary level teachers studied for two years locally at the Seychelles Polytechnic's School of Education and then for a further two years at the University of Sussex, UK, to obtain a Bachelor of Education degree (Lacey *et al.*, 1999). However, the general feeling seems to be that the venture was less successful than anticipated. It has proved to be costly and the graduate product has not generally been of the expected quality.

During the early years of the Seychelles Polytechnic, there existed a dynamic working partnership between the curriculum development personnel of the then National Institute of Pedagogy (NIP) and the personnel of the School of Education and Community Studies of the Seychelles Polytechnic with regard to the implementation of the pre-service teacher- training guidelines laid down in official policy documents. Over the years however, the School of Education and Community Studies has become better staffed and the responsibilities of the curriculum development personnel have broadened. As a result, the former working relationship has unfortunately been severed and remains strained. Keeping in mind the strong disposition towards personalisation in small states, a 'jealousy parameter' cannot be ruled out as another possible reason for this situation. Through subsequent consultancy work by British experts the original pre-service training guidelines have gradually been reshaped, and the current programme, which is yet to be evaluated, is more of a mirror image of pre-service teacher-training programmes in Britain. Even more disturbing is the fact that its 'ownership' appears questionable (gauged from discussions at executive level in the Ministry of Education and Culture); and many of the underlying principles of the pre-service teacher-training guidelines in the Education Policy Document of 1985 seem to have been overlooked.

It is also interesting to note that, traditionally, locally initiated in-service workshops have always been organised for teachers but hardly any have been arranged for headteachers. This oversight may have a strong bearing in explaining the inability of headteachers to handle the new responsibilities thrust upon them by the school reform programme.

Turbulence in the school environment

The education reforms of 1978, and more importantly those of 1991, brought tremendous turbulence in the school environment to which headteachers were requested to accommodate in a short space of time and with no adequate preparation.

The education reform of 1991 resulted in the concept of secondary schools (S1–S4) being introduced in what was previously organised as a primary cycle set-up. In a number of cases, the primary cycle (P1–P6) and the secondary cycle (S1–S4) were on the same premises and the responsibility of the same headteacher. In certain instances, whole cohorts of students were transferred from one school to another for the entire or part of their S1–S4 cycle. Thus, some headteachers who had been accustomed, through the zoning policy, to having students from specified catchment areas, found themselves with students being bused over from other zones. In addition, they found themselves with students, who up to

1990 would have left or gone to the National Youth Service, staying for one more year under their tutelage. Headteachers who had previously managed small schools with organisational and infrastructure patterns intended for primary schools suddenly found themselves running secondary schools with up to 1000 students.

It has already been noted how aspects of official policy were asking headteachers to establish stronger working links with the community, when traditionally the tendency had been for headteachers to undertake their roles in isolation, aloof from the external environment.

The majority of headteachers in the country are Seychellois, with long years of school service, and who have typically made it up the ranks as experienced, enterprising teachers with the perceived qualities for headship but with no formal specific training for these occupational roles. The potential implications of such an approach to promotion to headships in general is highlighted by Handy (1984). Furthermore, no objective selection procedures for headships have existed and one cannot rule out the influence of social acquaintances and one's political profile in the consideration of promotions.

Coupled with these changes and circumstances, the headteachers found themselves with added responsibilities that included the management of the school budget and of additional infrastructure, as well as an enlarged and diversified student and staff population. In many cases these responsibilities called for the effective delegation of some functions, and for stronger leadership and managerial skills – qualities that, on the whole, most headteachers could not be blamed for lacking. These dramatic changes and the undertaking of new and more diversified roles were unfortunately not preceded or accompanied by a comprehensive system of training and support. To my knowledge the situation has not improved much since the 1990s, with the exception of:

- The creation of the post of administrative officer and their employment to assist the headteacher in administrative matters;
- The creation of the post of studies co-ordinator and their employment to assist headteachers with curriculum monitoring and implementation matters;

- The implementation of a linkage programme with the University of Québec at Trois-Rivières, Canada, to train a select group of secondary school headteachers in school administration through a distance education mode.

In view of this situation, it is perhaps not surprising that secondary school management has encountered numerous difficulties and it has not been easy to attract competent young Seychellois who aspire to become headteachers. Management skills are vital and continue to be relegated to a subordinate role in continuous professional development.

Conclusion

By way of conclusion, one may be tempted to take an excessively pessimistic view of the outcome of the efforts to transform the secondary school system in the Seychelles. Too often, there is also the added tendency to expect 'too much, too fast'. The general outcome does include evidence of success. The experience has certainly alerted policy-makers to the fact that it is wrong to adopt a technocratic perspective on educational development and curricular reform, entrusted to qualified experts. As with Newton's Law of Motion, action and reaction will be equal and opposite. The best recipe for change management in schools is for headteachers, teachers, parents and communities to discuss and agree on how any national policy documents can best be translated into practice, while the state guarantees the resources necessary for the successful pursuit of those goals.

Nor is it fair to load education with too many expectations. It is tempting, but wrong, to ascribe broad, culturally transformative powers to education. Reforming education alone without also changing other aspects of society (such as the labour market or the nature of economic incentives) will have little effect on such lofty goals as economic growth and social equality, nor on closer-to-home issues such as educational performance. Pragmatically, an educational system is itself a product of a particular cultural and political regimen that may prove resilient to change and very stubborn to dislodge.

DISCUSSION POINT

- Are headteachers to be seen as senior administrators or senior educators? At what point, if any, should school management be entrusted to management professionals? If schools are increasingly being called upon to adopt organisational and financial management principles from the private sector, is it fair and realistic to expect teachers who have been promoted up the ranks to rise to the occasion?

20 Lifelong Education in Cyprus

Iacovos Parperis

- Adult education demands respect and appreciation as much as any other aspect of education. However, its image suffers from a long association with remedial education – as a tool to combat illiteracy.
- It is often not appreciated that the methods associated with adult education – or rather, adult learning – must depart from the styles and techniques associated with the schooling of young children.
- Those being trained as qualified teachers would benefit from an exposure to *andragogy* – the specific pedagogy of adult education.
- It may be useful to consider a combination of public subsidy and private initiative to finance adult education centres.

SMALL STATE CONSIDERATIONS

- **A small state must typically support a higher per capita public expenditure than larger jurisdictions. This is because it must still provide for the institutional fabric of a total society.**
- **Educational environments should be planned, designed and equipped keeping in mind their likely multifunctional uses in a small state, as in the case of primary schools doubling as adult education centres.**
- **There are strong and valid reasons for multi-skilling in small states. Such pressures should be recognised in the structure of professional formation; teachers should be prepared for their likely role in adult education and should not continue being trained only in relation to pre-primary, primary or secondary classes.**
- **The small-scale environment exacerbates empire building and territoriality amongst office holders. This can result in scorn for co-operation and ongoing consultation.**

Catchphrase

'Lifelong education' has become a catchphrase of contemporary society. However, a watertight definition of lifelong or adult education remains fraught with considerable difficulty. Despite the fact that the provision of lifelong education is becoming increasingly important in public documents, education strategies, labour market policies and the public eye, there is still much confusion and a good deal of uncertainty as to what it really is. This confusion is itself an indicator of the uncomfortable status of lifelong education within the general educational system.

This chapter will first briefly review a number of differing yet complementary definitions of lifelong education so as to highlight its different, sometimes contrasting, functions and intentions. It will then explore the provision of lifelong education in Cyprus, focusing on a series of pressing constraints. It will conclude with a number of specific recommendations that emerge in relation to the critical appraisal undertaken earlier. Attempts will be made to introduce a small state perspective into the the argument.

Terms

A number of different terms have been coined in an attempt to overcome some of the problems which seen to be inherent in the term 'lifelong education', each of them conveying specific information and highlighting a distinct perspective.

'Recurrent education' is one such phrase, embracing schooling as well as lifelong education, and stressing the right of the individual to enter and leave the educational world at will, with the fluidity expected from such a set-up.

'Lifelong education' envisages education as built into the process of living rather than as separated into a range of special and time-restricted activities. Education is here conceived as a lifelong process, from the cradle to the grave.

'Non-formal education' describes all out-of-school education for any group of any age; it refers both to the format of this education as well as to its contents and possibly its methods, which are seen to be more experience-related and adult-sensitive than the traditional school curriculum. This definition also acknowledges and does justice to out-of-school educational initiatives.

Finally, the contemporary emphasis on learning, rather than education, is intended to remind us that it is the learners who ultimately must manage the environment in order to render it educational. This perspective positions learners as subjects of the learning process. Such a line of reasoning is common sense, given that learners are the intended beneficiaries. However, educational environments and didactic procedures are structured in such a manner as to suggest otherwise, bringing about the objectification of learners, deliberately or otherwise.

Part of the reason for the lack of agreement in defining lifelong education is the search for a valid definition that will cover the very diverse educational cultures of the various countries, so that the practice of lifelong education in all countries can be adequately compared. As a result of this concern, international statements defining lifelong education have become longer, broader and increasingly generic in an attempt to suit all peoples and places.

Perhaps the broadest definition of lifelong education remains that given in 1970 by the (then) National Institute of Adult Education (now NIACE) of England and Wales:

> *Lifelong education is any kind of education for people who are old enough to work, vote, fight and marry and who have completed the cycle of continuous education commenced in childhood. They may want to make up for limited schooling, to pass examinations, to learn basic skills of trade and profession or to master new working processes. They may turn to it because they want to understand themselves and their world better and to act in the light of their understanding, or they may go to classes for the pleasure they can get from developing talents and skills – intellectual, aesthetic, physical or practical. They may not even 'go to classes'; they may find what they want from books or broadcasts or take guidance by post from a tutor they never meet. They may find education without a label by sharing in common pursuits with like-minded people.*

In 1976 at Nairobi, UNESCO used the term 'lifelong education' to include the:

> *... entire body of educational processes, whatever the content, level or method, whether formal or otherwise, whether they prolong or replace initial education in schools, colleges and universities, as well as apprenticeship, whereby persons regarded as adult by the society to which they belong develop their abilities, enrich their knowledge, improve their technical or professional qualifications, or turn them in a new direction and bring about changes in their attitudes or behaviour in the two-fold perspective of full personal development and participation in balanced and independent social, economic and cultural development.*

The setting

Cyprus is the third largest island in the Mediterranean Sea with a total land area of 9,250 sq km. The resident population has now reached 735,000, of whom 78 per cent are Greek Cypriots. The island became a sovereign state in 1960 and its major political challenge today remains that of finding an acceptable solution to 'the Cyprus problem' – the persisting division of the island between the Greek Cypriot and Turkish Cypriot communities.

Education has always been a key policy priority. State expenditure on public education is at least 6 per cent of the gross national product. Even culturally, education has been looked upon as the vehicle to fulfil ambitions and expectations. The educated are highly esteemed and are socially recognised as leaders. Families willingly undergo substantial financial sacrifices in order to be able to finance the best education for their children and there is full support for the spending of public resources to provide the country with a sound and enviable educational system. Persianis (1981) argues that a small population and a relative lack of natural resources contribute to a shift of investment in favour of human resources and intellectual capital.

Constraints

At least 45 different subjects are taught in some 270 centres for lifelong education run by the state in any one year in Cyprus. Around 14,000 participants – 84 per cent of whom are women – attend classes directed by around 460 tutors. The main object of the participants' involvement is recreational, with dancing being the preferred subject for more than a quarter of the enrolled adults. Almost all celebrations relating to events such as weddings, engagements, baptisms and birthdays, as well as religious and national celebrations are accompanied by local music and dancing. Thus, dancing is a skill that is essential for full and active participation in several aspects of social life.

Although there is a considerable amount of lifelong education going on in Cyprus, the present condition of lifelong education provision is certainly not satisfactory. In spite of the fact that Cyprus has developed a formal school system the standards of which can be favourably compared with those in countries with a strong track record in formal education, lifelong education has not been sufficiently developed, due to various constraints among which is a lack of co-ordination, as well as social and cultural factors.

Lack of co-ordination

The lifelong and non-formal education offered by the various bodies in Cyprus is characterised by extensive fragmentation and incoherence. All the activities are organised and run independently of one another and the lack of co-ordination is obvious. Perhaps the small-scale environment creates a stronger disposition to 'empire build' and protect territory among power holders as well as bureaucrats, resulting in scorn for co-operation and ongoing consultation. As Usher (1984) stresses, in his Report on Adult Education in Cyprus:

> *Even where activities (such as evening gymnasia and evening educational centres) are nominally under the same Ministry, they are located in different divisions and no attempt at co-ordination is made. No mechanism exists for bringing together the adult education work of different Ministries, formal and non-formal, vocational and non-vocational, the public sector providers and voluntary bodies.*

The result of this situation is, inevitably, fragmentation. There is a clear lack of direction and policy that in the end harms everyone and acts as a serious constraint upon the development and expansion of lifelong and non-formal education in Cyprus.

Social and cultural factors

The people of Cyprus have traditionally had a blind faith and confidence in education as a means of achieving high social mobility; nevertheless, whenever they refer to education, they usually mean the formal educational system. Usher (1984) goes on to state:

> *One of my deepest impressions which I gained from my visit to Cyprus was the profound respect which the people of Cyprus have for education. But, at*

the same time, there is a paradox, because this desire for education seems to extend only to school and higher education and not, as yet, to lifelong education. I am puzzled that adults do not want as good an educational provision for themselves as they obviously want for their children.

Among the social and cultural factors contributing to the creation of this attitude towards lifelong and non-formal education, are the following seven features, highlighted by both Papaleontiou (1984) and Symeonides (1992):

- People with high qualifications feel that they may lose, rather than gain, social prestige by attending training courses.
- Almost all Cypriot parents will make any effort to secure the best possible education for their children. They spend their energy, free time and money in order for their children to obtain extra qualifications in private schools, coaching centres and private lessons at home. This fact is likely to prove a constraint on them seeking further training and education for themselves.
- The state values formal education very highly and it spends available resources on its quantitative and qualitative development. This policy results in the devaluation of lifelong education.
- The formal education system has a very limited access to lifelong education, a fact that inhibits the development of lifelong education.
- A degree of prejudice against vocational education and manual work still exists in Cyprus. According to Persianis (1986):

  > *... the old dichotomy of Plato and Aristotle between the body and the mind has persisted in the Greek territory through the ages. The most respected form of work is believed to be mental and manual work is rejected as something inferior.*

- In the Greek Cypriot family, and in society in general, there still exist traditional gender stereotypes concerning occupations, roles and status. Men enjoy many more out-of-home opportunities than women in Cyprus. However, lifelong education classes have afforded a rare structured opportunity for women to venture into the public space beyond the home, even though they then tend to follow courses that strengthen their marital and domestic roles – their main interest is in dress-making and cookery classes.

- The level of popular and civic appreciation of the potential benefits of lifelong education remains very low.

Constraints concerning lifelong education centres

A great deal of excellent work has been done in Cyprus in the provision of non-vocational, community-oriented, lifelong education. The Adult Education Centres of the Ministry of Education and Culture not only provide leisure-time education but also have an important role to play in socio-cultural animation and community development. This, of course, is particularly important in rural areas experiencing problems of economic decline and depopulation.

However, while a great deal has been done, the constraints concerning the following aspects of the Centres' functioning must be overcome:

Administration/organisation

The present lack of an effective organisational structure to support activities of the Centres' constitutes a serious constraint. Not much seems to have changed over recent decades. The observations by Melo (1982), Usher (1984) and the report by a group of adult educators from Hampshire, UK (1989), on the situation of lifelong education within the Ministry of Education, remain largely valid.

The responsibility for the functioning of the Lifelong Education Centres rests with the Director of Primary Education, who is also responsible for special education and youth work. Directly responsible to the Director is the Inspector for Adult Education. The organisation of the Centres' programmes lies with five co-ordinators who are responsible to the inspector; but their small number does not allow them the time needed to work effectively to create quantitative and qualitative expansion of the programmes. All the co-ordinators are primary school teachers, appointed on secondment for one year. Although their situation is, in principle, renewable, there is a clear lack of stability and continuity. With their status so uncertain and liable to change, hardly any long-term policies are discussed, endorsed and implemented.

The existing association of lifelong education with remedial, primary education lingers on, since the literacy eradication programme was one of the main challenges of lifelong education in Cyprus after 1969. In fact, the association of lifelong education with literacy training was made obsolete years ago, thanks to the fairly high average level of educational attainment among the Cypriot population as a whole. The literacy rate is now an enviable 95 per cent.

Yet the misunderstanding about the purposes of lifelong education persists. One contributing factor that encourages this negative association is the fact that the vast majority of lifelong education centres operate in and through primary schools. Imagine adults having to use the small chairs and tables intended for young children. The structure of the educational environment certainly reinforces the interpretation of 'adult education' as meaning adults expected to behave and learn as if they were young children.

Educators

The training of lifelong educators is a key issue for the development of lifelong education. Thus, it could be argued that the creation of a strong cadre of lifelong educators constitutes a fundamental prerequisite for the effective functioning of the Adult Education Centres.

The need for training for lifelong educators is stressed by Jarvis (1995) who states that many who enter lifelong education, even if they are qualified teachers, have no qualifications at all in the education of adults; their teaching qualifications are typically in the education of young children. In fact, until 1979 all the tutors at the Centres for Lifelong Education were primary school teachers. However, pedagogy is not equivalent to andragogy: teaching adults is not the same as teaching children. While there are common elements between them, there are enough significant differences to raise questions about the appropriateness of a pedagogic qualification for teaching adults and, consequently, the specific training of lifelong educators can be considered as a necessary factor for successful lifelong education.

Furthermore, one of the advantages of a small state is that it can promote the professional development of multi-skilled individuals. The environmental demands for flexible specialisation are so strong and recurrent that it is quite natural to expect to be asked to provide a service or dedicate expertise to an area which would not have fallen within one's remit had one opted for a narrowly defined training programme. In spite of this, however, the professional formation of teachers in Cyprus does not acknowledge this tendency; worse, policy-makers may assume that the skills and formation required of an lifelong educator are identical to those of a primary school teacher. This mistaken impression may be a result of a lingering understanding that lifelong education means remedial education. Even if that were so, remedial education for adults should be conducted quite differently from primary or secondary remedial education.

The situation in Cyprus concerning the training of educators to work in Adult Education Centres constitutes a serious constraint upon the development of these same Centres. Usher (1984) states:

> *I was impressed by the enthusiasm and dedication of the existing educators but shocked to hear that they receive no prior training in working with adults. In the end, the quality of lifelong education provision is largely determined by the quality of educators which, in turn, is a matter of proper training.*

Thus some important decisions need to be taken in the very near future in order for the above constraints to be overcome.

Funding

The present level of financial support offered to the Centres by the Ministry of Education and Culture seems to be quite inadequate and places very real constraints upon further expansion. The payment allocated to the lifelong educators at these Centres also leaves much to be desired.

Some 80 per cent of tutors engaged in lifelong education today are unemployed university graduates who receive a temporary appointment. Teachers who enjoy tenure are paid at an 'overtime rate', while those temporarily appointed and who may be equally well qualified receive, for exactly the same work, about half the amount and this only after a lengthy procedure that requires special authorisation from the Ministry of Finance. In addition, no travel expenses are offered to those educators who are asked to teach their special subject in rural areas.

Recommendations

The need for a clear and coherent lifelong education policy is urgent. This policy must be defined and explicitly announced by the authorities and this should place the sector at parity with the better known and more traditional levels of the educational system. Government officials and spokespersons should refer more frequently to lifelong education in the context of the development of Cypriot society, namely as an instrument for inter-generational equality, appropriate rural development, harmonious urbanisation, culture friendly tourism, social mobility, national and cultural identity, and lifelong cultural and personal fulfilment. I will limit my observations here to an assessment of what measures should be taken in relation to three aspects of the provision of lifelong education which have already been described in this chapter.

Personnel

For the Adult Education Centres to function more effectively, the number of district co-ordinators and regional organisers must be increased considerably. Serious thought should also be given to the designation of all secondary and primary schools as adult education centres. Each school should have at least one lifelong education organiser on its staff, with the responsibility for planning and implementing a programme of activities under the direction of the area co-ordinator.

Urgent decisions also need to be taken with respect to the training of lifelong educators. As discussed earlier, such specific training is a prerequisite of the Centres' effectiveness. Suitable in-service training courses should be organised for staff who are already on the lifelong education faculty, either by the University of Cyprus or by the Pedagogical Institute. Besides this, the University of Cyprus should revise its curriculum in order to include subjects and methods relating to lifelong education which go beyond its current initial teacher training programmes and cater also for the specific needs of adult educators. All post-secondary students of education should also be exposed, at some point during their studies, to the acquisition of a set of knowledge, skills and attitudes appropriate to lifelong education. In addition, the possibility of training existing lifelong educators and administrators abroad should not be excluded.

Funding

Cyprus is not a poor country, although because it is a small state it has to support a higher per capita public expenditure than larger jurisdictions. Thus, the basic problem is not so much the absence of suitable sources and means of funding but the absence of political will and commitment to allocate funds to lifelong education initiatives. The Ministry of Education should certainly reconsider its current funding practices. I am not suggesting any increases in participation fees. However, the Ministry might consider giving each Lifelong Education Centre an annual subvention based on student enrolments in the previous academic year. Beyond that, the centres could also be allowed the freedom to carry out their own fund-generating activities, including co-operation with voluntary societies and non-governmental organisations. This should create a suitable balance between public subsidy and private initiative.

Part of such funding should also be allocated to transforming schools, especially primary schools, as equally appropriate sites for lifelong education. Primary school design and fittings should ideally lend themselves also to suitable lifelong learning environments. In small states with a premium on the number of public and municipal facilities, it is crucial to be able to exploit these for different functions. States may be small, but they nevertheless remain total, and must provide the full range of public services expected by citizens of any state. Less infrastructure is no excuse for lack of action; thus, services need to be grouped and provided for from multifunctional locations, such as schools.

Curriculum

Finally, lifelong education centres should also be expanded in order to meet the diverse needs and interests of the majority of the Cypriot population.

Thus, the following programme developments may need to be considered:

- Lifelong education activities could be introduced in the military camps, in co-operation with the National Guard, since all able-bodied Cypriot males are obliged to perform military duties;
- More attention should be given to meet the needs of the growing percentage of senior citizens in the Cypriot population;
- Courses should include consciousness-raising activities meant to expose and critique power relationships – in the spheres of work, management and employment; minority groups and civic rights in Cypriot society; health, diet and leisure; disability and access; and gender roles in the family.
- A lifelong education programme could also assume responsibility for parental education, which should be restricted to child development, but should also include a better understanding of the parental role, communication skills and the development of assertive authority;
- Finally, the commitment for the total eradication of the scourge of illiteracy in Cyprus should be a priority of lifelong education programmes.

Change will not happen overnight; nor can we realistically expect lifelong education to assume a national prioritisation above other areas of education or public policy. However, addressing such challenges should contribute vastly to the significant effectiveness of lifelong education provision in Cyprus.

DISCUSSION POINT

- **Adult Education programmes can serve as interesting sites for 'public-private partnerships'. The state could support such provision with the allocation of schools as learning sites and the lease of educational equipment, while teaching and administrative staff as well as other educational supplies could be** financed from student fees and other private sector providers. How would the different stakeholders benefit from such a consideration in relation to adult education? What are the dangers and challenges of such an approach? Can it, and should it, be extended to other areas of education, such as vocational education?

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This text presents the critical reflections of 18 senior officials working in 12 small states on the management and planning of education. Their comments are driven by the insights they gained as adult participants in a unique post-graduate programme at the University of Malta devised by, and for, the distinct small-scale imagination.

The editors of this text are both academic members of staff at the University of Malta. Godfrey Baldacchino (Associate Professor) is a social scientist and an island and small state specialist; Charles J. Farrugia (Professor) is Pro-Rector, former Dean of the Faculty of Education and coordinator of the post-graduate Diploma in Educational Planning and Management in Small States.

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